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**SAN FRANCISCO
COMMERCE & INDUSTRY
INVENTORY**

2007

San Francisco Planning Department

July 2008



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FINDINGS

FROM THE SAN FRANCISCO ECONOMIC & FINANCIAL RECOVERY STUDY

Employment is Recovering

In 2006, there were almost 536,000 jobs in San Francisco, an increase of about 12,600 jobs or 2.4% growth from the previous year. San Francisco employment has stabilized and is recovering after a four-year decline from 2001 to 2004. Overall employment, however, is still down almost 12% from the high of 608,270 jobs in 2000 (see Figure 1). Office, Retail, Hotel, and Cultural/Institutional/Educational (CIE) sectors all gained jobs in 2006, while the Industrial sector continued to lose jobs, a trend which started in 1999 (see Table 3.1).

Office Employment Up

In 2006, there were almost 536,000 jobs in San Francisco, an increase of about 12,600 jobs or 2.4% growth from the previous year. San Francisco employment has stabilized and is recovering after a four-year decline from 2001 to 2004. Overall employment, however, is still down almost 12% from the high of 608,270 jobs in 2000 (see Figure 1). Office, Retail, Hotel, and Cultural/Institutional/Educational (CIE) sectors all gained jobs in 2006, while the Industrial sector continued to lose jobs, a trend which started in 1999 (see Table 3.1).

Industrial Job Decline Continues

The number of industrial workers continues to decline, though not as rapidly as in previous years. The loss of almost 3,000 industrial jobs in 2006 represents a 3.5% drop from 2005. The Industrial sector has exhibited a 24.2% drop since 2001. This sector,

Overall, economy continues to improve in 2006

FIGURE 1 EMPLOYMENT IN SAN FRANCISCO FROM 1997-2006

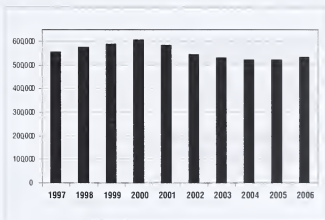
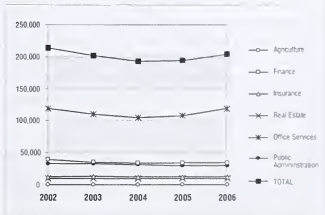


FIGURE 2 OFFICE EMPLOYMENT FROM 2002-2006



with some 81,700 workers, makes up 15.2% of the total workforce. All sub-sectors have experienced substantial losses in the last five years (see Figure 3). For many of these production, distribution and repair sub-sectors, such as Wholesale and Apparel Manufacturing, this represents part of a long-term decline. Still, in 2006, some sub-sectors of industrial employment showed gains: Construction jobs grew some 4.7% and Other Manufacturing is up 2.2%. Despite this drop, the number of industrial establishments increased 0.4% to just under 4,850 (see Tables 3.2.3 and 4.2.3).

Cultural, Institutional, and Educational Jobs and Establishments Continue To Rise

Cultural, Institutional and Educational (CIE) is San Francisco's second biggest employment sector with almost 130,650 workers. For the fifth straight year, there has been steady growth in CIE jobs, including a 1.5% increase since 2005 and a 6.9% increase since 2001 (see Figure 4). Distribution of this job growth within the CIE sector however, has not been even: jobs in the Educational Services and Health Care subsectors are growing while Art & Recreation and Social Assistance jobs are on the decline. With over 20,170 establishments, CIE is the largest sector in the economy—largely driven by the number of small day care establishments and home-based businesses (see Tables 3.2.4 and 4.2.4).

Retail Sector Continues to Improve

The retail sector also grew for the fifth consecutive year and retail sales reached \$9.59 billion in 2006. Adjusting for inflation, this is an increase of 9.2% from 2005 and 13.0% since 2003. Nevertheless, retail sales in 2006 are 10.8% lower than their historic peak in 2000 (see Table 5.2.1).

In addition to sales, retail jobs increased 2.4% in 2006 to just over 98,290. The overall increase masked some churning within the industry including a substantial increase in General Merchandise jobs and declines in the Food Stores and Other Retail Stores sub-sectors (see Figure 5).

The number of retail establishments also increased for the first time in four years to a total of some 7,520 retail establishments, a 0.9% increase from 2005 (see Tables 3.2.2 and 4.2.2).

FIGURE 3 INDUSTRIAL EMPLOYMENT FROM 2002-2006

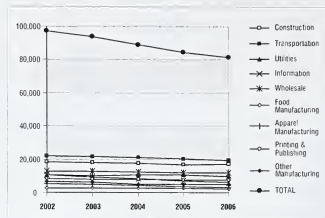


FIGURE 4 CULTURAL/INSTITUTIONAL/EDUCATIONAL EMPLOYMENT FROM 2002-2006

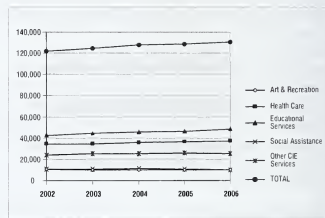
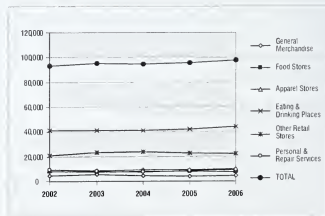


FIGURE 5 RETAIL EMPLOYMENT FROM 2002-2006

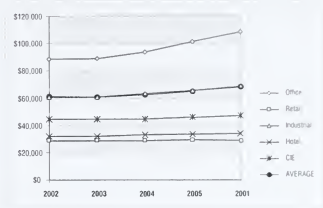


Average Wages Reach an All-Time High

Real wages have risen in San Francisco for the third consecutive year (see Figure 6). The \$70,893 per worker average represents a 5.3% increase from 2005, and is the highest level on record. This average wage increase occurred in all sectors except Retail, which saw a 2% drop.

Office workers continue to be the most highly compensated, at an average of \$107,870 per year. The gap is also widening, reflected by a 6.3% average wage jump from 2005 for this sector. Smaller increases were registered in the Cultural/Institutional/Educational (3.0%) and Industrial (4.1%) sectors (see Table 5.1.2)

FIGURE 6 REAL WAGES FROM 2002-2006

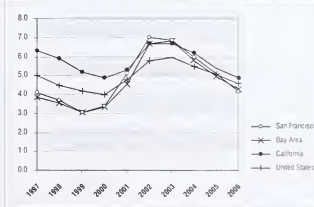


Bay Area Employment on the Rise, Unemployment Declines

Bay Area employment continued to increase in 2006 following four years of decline that marked the dot-com bust of the early 2000s. The addition of 90,000 new jobs brought the Bay Area total to 3.41 million employed residents in 2006. This represents an increase of 1.6%. However, this is still 5.5% lower than the high of 3.61 million workers in 2000. The number of employed San Francisco residents increased from 399,000 to 405,000 or 1.6% (see Table 2.1.3).

While regional employment increased slightly, regional unemployment declined significantly for the third consecutive year (see Figure 7). That regional unemployment started dropping before regional employment increased reflects the substantial number of people who left the labor force, and the region, with the downturn that followed when the dot.com bubble burst. In 2006, 4.3% of Bay Area workers were unemployed, down from 5.0% in 2005 and a recent high of 6.8% in 2003. Still, unemployment rates were much higher than the recent low of 3.0% in 1999, or the height of the dot.com boom. Trends were similar in San Francisco, where only 4.2% of residents were unemployed in 2006. This is down from 5.1% in 2005 and a recent high of 7.0% in 2002. It still represents a much higher rate of unemployment than the recent low of 3.1% of 1999 (see Tables 2.1.2 and 2.1.4).

FIGURE 7 BAY AREA UNEMPLOYMENT FROM 1997-2006



1.1 Context

This is the thirteenth *Commerce and Industry Inventory* prepared by the San Francisco Planning Department. It contains data for calendar year 2006. The immediate goal of this annual Inventory is to make local land use-related economic data available to community groups, businesses, and private and public agencies. The long-term goal is to establish a consistent time series of economic activity data and compile background information for updating the Commerce and Industry Element of the San Francisco General Plan. The analysis of economic trends and policy recommendations regarding economic activity in San Francisco are also contained in various documents published periodically by the San Francisco Planning Department.

This Inventory provides information on economic activities in San Francisco. It includes population, labor force, employment, establishments, wages, retail sales, government expenditures and revenues, and building activity data in San Francisco from 1997 through 2006. In addition, the data for previous years are revised when more accurate information was available during the preparation of this current publication.

The Inventory is organized into seven chapters.

- **Chapter 1 – Introduction** contains the context provided above. The remainder of the chapter defines the data formats, economic indicators and the variables contained within each data set, and two industry classification systems used in the Inventory to present the economic data in chapters 2 through 5.
- **Chapter 2 – Regional Overview** presents San Francisco's economy in its historical and geographical context by reviewing population, labor force, employment, and unemployment indicators for the San Francisco Bay Area. This information is presented by four subregions of the Bay Area: North Bay, East Bay, South Bay, and San Francisco. Unemployment data for the Bay Area, California, and the United States are presented as well.
- **Chapter 3 – Employment** presents information on San Francisco's employment from 1997-2006 in three predefined data formats which are: Industry Group, Land Use Category, and Commerce and Industry (C&I) District. These data formats are explained in Chapter 1 – Data Formats.

- **Chapter 4 – Establishments** reports the number of establishments as places where businesses are operated or where service and industrial operations are performed. The chapter presents data on the number and distribution of active business establishments by Industry Group, Land Use Category, and Commerce & Industry District, and Establishment Size-class.
- **Chapter 5 – Monetary Transactions** measures various aspects of the city's economy in monetary terms. This chapter provides data related to wages, taxable retail sales and sales permits, city government revenues and expenditures. Wage data are presented by Land Use Category. Taxable retail sales and permits data are presented by type of business. City government revenues and expenditures are reported by source and function.
- **Chapter 6 – Building and Land Use** provides information regarding construction activity in San Francisco. It presents the number of building permit applications and the total construction cost related to permit applications from 1997 to 2006. The permit applications by permit status are reported only for 2006. This chapter also contains statistics on land use in San Francisco. The data in this chapter are derived from the San Francisco Department of Building Inspection and are summarized by Neighborhood Plan Area rather than Commerce & Industry district format used in chapters 2 through 5.
- **Chapter 7 – Transportation** describes recent trends in San Francisco's transportation and transit systems. This includes analysis of mode split (i.e., what kind of transportation people use to complete their trips), parking availability, vehicle occupancy (i.e., the number of people per private vehicle), transit service, and Transit Impact Development Fee (TIDF) revenues).

1.2 Data Formats

The economic data in the Inventory are presented in terms of time, type of activity, and geographic distribution. The economic indicators are measured by

their specific units such as employees, establishments, and dollars. The Inventory provides a framework for comparisons, cross-references, and cross-tabulations among various economic indicators by using three specific data formats or groupings of the data:

- Commerce and Industry Districts
- Land Use Category
- Industry Group.

These data groups are discussed below. To the extent possible, the data in the Inventory, which are gathered from different sources, are aggregated into these three pre-defined formats. Some of the data remain in their original formats because of limited detail in the original data source.

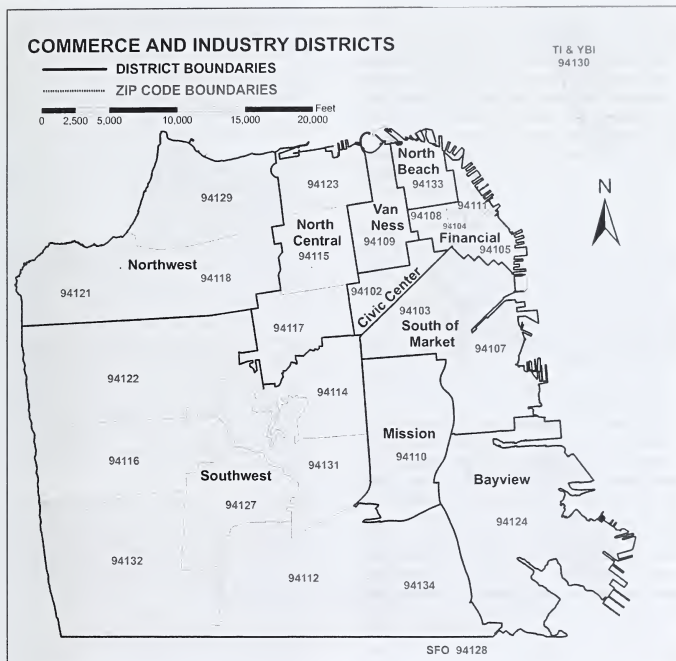
Commerce & Industry Districts

The Commerce & Industry (C&I) Districts are characterized by predominant economic activities, employment concentration, business density, and other spatial characteristics. This classification aggregates small zip code based units into 10 large districts encompassing the entire city of San Francisco. Each district is defined by one or more postal zip codes because a zip code is traditionally the smallest geographical unit for which economic data are available. The district boundaries are as close as possible to census tract boundaries, so that data available from the census can be meaningfully compared to the economic data. The C&I district boundaries are shown on Map 1.1.

Commerce & Industry Districts are characterized by a concentration or specialization in one type of Land Use Category or similar neighborhood commercial activities.

- The **Mission** and **North Beach** districts present intense local retail activities and have very defined identities for the local and visitor population.
- The **Bayview** district houses a high concentration of industrial activities and shows a low density in terms of population, employment, and establishments.

MAP 1.1 COMMERCE & INDUSTRY DISTRICTS



- The **Civic Center** is defined by its high concentration of institutional and government activities.
- The **Van Ness** district is delineated around a commercial corridor and some residential activity.
- The **North Central** district concentrates a great proportion of institutional activities, mainly health related, and is a transitional area between downtown and the more peripheral residential area to the west.
- The **South of Market** district contains a combination of office and industrial activities, located between the Financial district and Bayview.
- The **Financial** district covers the densest area with the highest concentration of employment and establishments.

- The **Southwest** and **Northwest** districts are predominantly residential, with a very low business density.

In addition to the above ten zip code-based districts, there is an “unclassified” category. This category represents home-based business establishments and organizations, particularly care-givers. These groups do not register a physical address with the State and thus are unable to be classified into a specific geographic district. The Unclassified C&I district also includes San Francisco International Airport, Treasure Island, and Yerba Buena Island.

The Inventory also provides information on geographic areas other than Commerce and Industry Districts. These areas are referred to as *Plan Areas* and are used exclusively in Chapter 6. The neighborhood district boundaries tend to follow more homogenous economic patterns than the zip code-based Commerce and Industry districts.

Land Use Categories

This classification facilitates the use of economic information for studies related to land use policy development. It is useful in the evaluation of employment, establishments, and transactions within their physical parameters. It matches the type of economic activity with a corresponding type of building structure as well as the prevalent land use pattern. This classification is based only on San Francisco’s business activities and land use pattern. Its application to any environment outside of the city may require some adjustments.

The six Land Use categories used in this Inventory are: Office, Retail, Industrial, Hotel, Cultural/Institutional/ Educational (CIE), and Residential. The Residential land use category is addressed only in Chapter 6 in the context of building permits and land use by plan areas. The definitions of each of these categories are as follows:

- **Office** activity includes professional services such as administration, legal services, architecture, engineering, real estate, computer services, research and development activities, and government administrative functions. Three types of spaces are considered: primary offices, which

mainly include headquarters and large firms; secondary offices, which include small professional offices and services, and walk-in customer facilities such as banking.

- **Retail** activity includes large- and small-scale sales and services to walk-in customers, such as department stores, galleries, and eating and drinking establishments (restaurants, bars, fast food service, delicatessens, etc.). This category also includes neighborhood services and shops such as dry cleaners, auto repair shops, and beauty shops.
- **Industrial** activity includes establishments related to processing and movement of goods and provision of citywide infrastructure. It includes manufacturing, wholesale, construction, transportation, information, and utilities. Most of these activities take place in buildings with large, open floor plates—structures that can house machinery and industrial equipment. Some of the food manufacturing and printing activities, however, are located in small shops due to the small scale of production, small machinery required, and/or reliance on the retail component of their business.
- **Hotel** activity is defined as a separate Land Use Category because it has a direct relationship to the visitor sector and constitutes a specific type of land use and building structure. It includes any type of lodging such as hotel, motel, or bed and breakfast.
- **Cultural/Institutional/Educational (CIE)** activities cover the social spectrum of economy by including entertainment and artistic activities as well as health and educational services. This category covers the widest variety of space types from large establishments (hospitals, universities, schools, museums) to small studios or businesses (nightclubs, art studios). These activities are more geographically disparate than the other categories. They are often specialized facilities, many of which are non-profit organizations.

Industry Groups

This classification facilitates collection and tabulation of data related to individual business establishments. It aggregates all business establishments into specific Industry groups according to similarity of their product or process used in production related activities. These Industry groups are based on two pre-established industry classification systems—*Standard Industry Classification (SIC)* system and *North American Industry Classification System (NAICS)*. These systems were developed by the United States Department of Commerce and adopted by the California Employment Development Department (EDD) to classify all business establishments and organizations. NAICS is a new system, which was released in 1997 and last revised in 2007. It replaces the SIC system used before 2001. Both systems are discussed below.

- The SIC system classifies all business establishments based on the kind of product or service they provide. It is a four-digit coding system. The first two digits of the code represent sectors to represent major categories of economic activities, first three digits represent industry groups, and four digits correspond to specific industries.
- The NAICS classifies all business establishments based on the similarity in the process used to produce goods or services. NAICS is a six-digit coding system. Under NAICS, the first two digits of the code are designated as 'sector' to represent general categories of economic activities. The first three digits are designated as 'sub-sector' to represent major category of economic activities. The first four digits represent 'industry group', while the five and six digit classifications correspond to specific industries.

Some of the data in the Inventory are presented by Industry Group using the North American Industry Classification System (NAICS), which includes these industry sectors: Farm, Natural Resources, Mining

and Construction, Manufacturing, Transportation, Utilities, Information, Wholesale Trade, Retail Trade, Financial Activities, Professional and Business Services, Educational and Health Services, Leisure and Hospitality, Other Services, and Government. Other Services includes repair and maintenance, personal services, religious and grant making services, and services related to the operation of a private household. Government includes all civilian employees of federal, state, and local government, regardless of the activity in which employees are engaged.

Industrial Classification Systems: NAICS and SIC

NAICS organizes all economic activity into 20 broad sectors as opposed to 10 sectors under the SIC system (Table 1.1). The purpose for this broader categorization is to clearly establish and distinguish each Industry sector from another. NAICS also includes 350 new industries including several new high-tech and services related industries which were not appropriately defined and recognized in the SIC system.

For the purposes of this Inventory, SIC and NAICS classifications are aggregated into Industry groups and land use categories. Table 1.2 shows major Industry groups related to each Land Use Category and their corresponding SIC and NAICS groupings.

Data from 2001 to 2006 in Chapters 3 to 5 of this Inventory were prepared using business and employment data organized by NAICS. Data from 1997-2000 in this Inventory were prepared using business and employment data organized by SIC code. Several adjustments have been made in the data from 1996-2000 so that data in these years are comparable with 2001 data to the extent possible. Even after these adjustments, however, differences in a few Industry groups in 1996-2000 are significant from the corresponding data groups in preceding years. Key Industry groups and Land Use categories with revisions in their data structure are listed in Table 1.3.

TABLE 1.1 MAJOR INDUSTRY CLASSIFICATION CATEGORIES

NAICS (Used since 2001)			SIC (Used through 2000)		
S.N.	Code	Sectors	S.N.	Code	Divisions
1	11	Agriculture, Forestry, Fishing and Hunting	1	00-09	Agriculture, Forestry, and Fishing
2	21	Mining	2	10-14	Mining
3	23	Construction	3	15-17	Construction
4	31-33	Manufacturing	4	20-39	Manufacturing
5	48-49	Transportation and Warehousing	5	40-49	Transportation, Communications, and Utilities
6	22	Utilities			
7	51	Information			
8	42	Wholesale Trade	6	50-51	Wholesale Trade
9	44-45	Retail Trade	7	52-59	Retail Trade
10	52	Finance and Insurance	8	60-67	Finance, Insurance, and Real Estate
11	53	Real Estate and Rental and Leasing			
12	54	Professional, Scientific, and Technical Services	9	70-89	Service Industries (includes business, engineering, hotels, motels, repair services, entertainment, recreation, health, education, social, and other services related industries)
13	55	Management of Companies and Enterprises			
14	56	Administrative and Support, Waste Management and Remediation Services			
15	61	Education Services			
16	62	Health Care and Social Assistance			
17	71	Arts, Entertainment, and Recreation			
18	72	Accommodation and Food Services			
19	81	Other Services (except Public Administration)			
20	92	Public Administration	10	90-98	Public Administration

Sources: Executive Office of The President; Office of the Management and Budget; San Francisco Planning Department

TABLE 1.2 CLASSIFICATION BY LAND USE CATEGORIES AND INDUSTRY GROUPS

LAND USE CATEGORY	NAICS SYSTEM		SIC SYSTEM		
	Industry Group (Used since 2001)	NAICS Code	Industry Group (Used through 2000)	Industry Sub-sector	SIC Code
Office Examples: Headquarter offices, professional services, branch banks	Agriculture	111-115	Agriculture	Agriculture	00-08
		211-213		Mining	10-14
		522-523		Finance	60-62
		524-525		Insurance	63-64
		531, 533		Real estate	65
		516		Transportation services	47
		518		Holding and investment offices	67
		519		Engineering & management	87
		541		Business services	73
		551		Miscellaneous	89
		561		Administrative & support services	
			Legal Services	Legal services	81
	Public Administration	921-928	Public Administration	Public administration	91.93.95-97
Retail Examples: Stores, restaurants, bars, commercial parking lots	General Merchandise	452	General Merchandise	General merchandise stores	53
		445		Food stores	54
		448		Apparel and accessory stores	56
		722		Eating and drinking places	58
		441, 447		Building materials & garden supplies	52
	Other Retail Stores	442	Other Retail Stores	Auto dealers & service stations	55
		443, 446, 451		Furniture & home furnishings stores	57
		453-454		Miscellaneous retail	59
		532		Rental & leasing services	
	Personal & Repair	812	Services and Repair	Personal services	72
				Repair, services, & parking	75, 76
Industrial Examples: Warehouses, factories, workshops showrooms, port television, telegraph cable, satellite	Construction	236-238	Construction	Construction	15-17
		488		Railroads, line-haul operating	40
	Transportation and Warehousing	485, 487	Transportation and Warehousing	Local & interurban transit	41
		484, 492-493		Freight transportation & warehousing	42
		491		U.S. Postal Service	43
		481, 483		Water and air transportation	44-45
		486		Pipeline transportation	46
				Electric, gas, & sanitary services	49
	Utilities	221	Public Utilities	Waste management services	
		562		Telecommunications	
	Information	515	Communications	Broadcasting (except internet)	48
		517		Wholesale	50-51
	Wholesale	423-425	Wholesale	Food manufacturing	20
	Food Manufacturing	311-312		Apparel & textile manufacturing	22, 23
	Apparel Manufacturing	313-315	Printing and Publishing	Printing and publishing	27
	Printing and Publishing	323, 511		Fishing	09
	Other Manufacturing	321-322, 337	Other Manufacturing	Lumber, furniture & fixtures, paper	24-26
		324-325		Chemicals & petroleum production	28-29
		316, 326-327		Rubber, leather, stone/clay/glass/concrete	30-32
		331-333		Metal, industrial machinery & equipment	33-35
		334-335		Electronics & electronic manufacturing	36
				Transportation equipment	37
	Repair Services	336, 811	Hotel	Instruments, miscellaneous	38-39
	Transp Equipment, Building Supplies	339, 444		Hotel, motel, campgrounds	70
	Film & Sound Recording	512		Motion picture production & recording	78
Hotel	Accommodation	721	Film & Recreation	Art, amusement and recreation	79
	Art and Recreation	711		Educational services	82
	Performing arts, amusement parks	713	Educational Services	Health services	80
	Education Services	611		Social services	83
	Health Care	621-623	Health Services	Museums, botanical & zoological gardens	84
	Social Assistance	624		Membership organizations	86
	Other CIE Services	712	Other CIE Services	Private households	88
		813		Public administration	92, 94
		814			
Cultural/ Institutional Examples: Theaters, museums, nightclubs, hospitals, libraries, schools, churches	*	*	Public Administration	Generally those, which are deemed confidential	99
Other	Unclassified Establishments	999	Non-Classifiable Establishments		

Source: Executive Office of The President; Office of the Management and Budget; San Francisco Planning Department

TABLE 1.3 CHANGES IN LAND USE CATEGORIES AND INDUSTRY GROUPS IN 2001

2001		SIC & NAICS Categories	NAICS Code	SIC Code	1997-2000	
Land Use Category	Industry Group				Land Use Category	Industry Group
Office	Office Services	Veterinary Services For Livestock	54104	741	Office	Agriculture
Office	Office Services	Veterinary Services for Animal Specialties	54104	742	Office	Agriculture
Office	Office Services	Horticulture Consulting	54160	781	Office	Agriculture
Office	Office Services	Landscape Architectural Services	54132	781	Office	Agriculture
Office	Office Services	Lawn and Garden Services	56173	782	Office	Agriculture
Office	Office Services	Ornamental Shrub and Tree Services	56173	783	Office	Agriculture
Office	Office Services	Carpet and Upholstery Cleaning	56174	7217	Retail	Personal & Repair
Office	Office Services	Tax Return Preparation Services	541213	7201	Retail	Personal & Repair
Office	Office Services	Babysitting Bureaus	56131	7299	Retail	Personal & Repair
Office	Office Services	Internet Publishing and Broadcasting	516110	2711	Industrial	Printing & Publishing
Office	Office Services	Advertising Specialties Goods Distributors	54189	5199	Industrial	Wholesale
Office	Office Services	Libraries and Archives	519120	8231	Cultural/Institutional	Educational Services
Office	Office Services	Film Archives	519120	7829	Cultural/Institutional	Art & Recreation
Office	Office Services	Travel Motor Clubs	561595	8699	Cultural/Institutional	Other CIE Services
Office	Public Administration	Parole Offices and Probation Offices	92215	8322	Cultural/Institutional	Social Assistance
Office	Public Administration	American Indian and Alaska Native Tribal Governments	92115	8641	Cultural/Institutional	Other CIE Services
Retail	Personal & Repair	Pet Care Services	81291	752	Office	Agriculture
Retail	Other Retail Stores	Air, Rail, & Water Transportation Equipment Rental	532411	4499	Industrial	Transportation
Retail	Other Retail Stores	Motor Vehicle Supplies, Used and New Parts, Tires and Tubes	44131	5013	Industrial	Wholesale
Retail	Other Retail Stores	Furniture	44211	5021	Industrial	Wholesale
Retail	Other Retail Stores	Floor Covering Stores	44221	5023	Industrial	Wholesale
Retail	Other Retail Stores	Brick, Stone and Related Construction Materials	44419	5032	Industrial	Wholesale
Retail	Other Retail Stores	Office Equipment	45321	5044	Industrial	Wholesale
Retail	Other Retail Stores	Computers & Computer Peripheral Equip. & Software	44312	5045	Industrial	Wholesale
Retail	Other Retail Stores	Medical, Dental, and Hospital Equipment and Supplies	446199	5047	Industrial	Wholesale
Retail	Other Retail Stores	Professional Equipment and Supplies	45321	5049	Industrial	Wholesale
Retail	Other Retail Stores	Electrical Apparatus, Equip. Wiring Supplies, Construction Materials	44419	5063	Industrial	Wholesale
Retail	Other Retail Stores	Hardware, Plumbing & Heating Equipment and Supplies	44413	5072	Industrial	Wholesale
Retail	Other Retail Stores	Farm and Garden Machinery and Equipment	44421	5083	Industrial	Wholesale
Retail	Other Retail Stores	Beauty and Barber Shop Equipment and Supplies	44612	5087	Industrial	Wholesale
Retail	Other Retail Stores	Stationery and Office Supplies	45321	5112	Industrial	Wholesale
Retail	Other Retail Stores	Heating Oil, Liquefied Petroleum Gas	45431	5171	Industrial	Wholesale
Retail	Other Retail Stores	Lawn, Garden, Flowers, Nursery Stock, & Florists' Supplies	44422	5191	Industrial	Wholesale
Retail	Other Retail Stores	Wardrobe Rental (Motion Pictures)	53222	7819	Cultural/Institutional	Art & Recreation
Retail	Other Retail Stores	Video Tape and Disc Rental	53223	7841	Cultural/Institutional	Art & Recreation
Retail	Other Retail Stores	Recreational Goods Rental	532202	7999	Cultural/Institutional	Art & Recreation
Industrial	Food Manufacturing	Custom Grain Grinding	311115	723	Office	Agriculture
Industrial	Food Manufacturing	Custom Slaughtering	311611	751	Office	Agriculture
Industrial	Food manufacturing	Meat Processed from Carcasses	311612	5147	Industrial	Wholesale
Industrial	Food manufacturing	Bottling Mineral or Spring Water	312112	5149	Industrial	Wholesale
Industrial	Apparel Manufacturing	Custom Tailors and Seamstresses	315	5699	Retail	Apparel Stores
Industrial	Apparel manufacturing	Converters, Broadwoven Piece Goods Fabric	31331	5131	Industrial	Wholesale
Industrial	Printing & Publishing	Printing and Embossing on Fabric Articles	323113	2396	Industrial	Apparel Manufacturing
Industrial	Other Manufacturing	Mops, Floor and Dust Manufacturing	339994	2392	Industrial	Apparel Manufacturing
Industrial	Other Manufacturing	Textile Automotive Trimmings, Seat Belts, Seat & Tire Covers	33636	2396	Industrial	Apparel Manufacturing
Industrial	Other Manufacturing	Motion Picture and Video Tape Production Industries	51211	7812	Cultural/Institutional	Art & Recreation
Industrial	Other Manufacturing	Commercial Distribution Film Libraries	51212	7829	Cultural/Institutional	Art & Recreation
Industrial	Other Manufacturing	Motion Picture Theaters	51213	7832	Cultural/Institutional	Art & Recreation
Industrial	Other Manufacturing	Television and Post-Production Services	512191	7819	Cultural/Institutional	Art & Recreation
Industrial	Other Manufacturing	Booking Agencies	512199	7820	Cultural/Institutional	Art & Recreation
Cultural/Institutional	Health Care	Homes for the Elderly, Other Residential Care	623312	8361	Cultural/Institutional	Social Assistance
Cultural/Institutional	Health Care	Mental Health and Substance Abuse Facilities	62322	8361	Cultural/Institutional	Social Assistance
Cultural/Institutional	Educational Services	Beauty and Cosmetology Schools	611511	7231	Retail	Personal & Repair
Cultural/Institutional	Educational Services	Barber Colleges	611511	7241	Retail	Personal & Repair
Cultural/Institutional	Other CIE Services	Education, Religious, and Charitable Trusts	81399	6531	Office	Office Services
Cultural/Institutional	Other CIE Services	Condominium Associations	813211	6732	Office	Real Estate
Cultural/Institutional	Other CIE Services	Caverns and Miscellaneous Commercial Parks	71219	7999	Cultural/Institutional	Art & Recreation
Cultural/Institutional	Other CIE Services	Voluntary Health Organizations	813212	8399	Cultural/Institutional	Social Assistance
Cultural/Institutional	Other CIE Services	Grantmaking, Giving, & Human Rights organizations	813219	8399	Cultural/Institutional	Social Assistance
Cultural/Institutional	Other CIE Services	Social Advocacy, Environment, Conservation, Wildlife Organizations	81331	8399	Cultural/Institutional	Social Assistance

Sources: Executive Office of The President; Office of the Management and Budget; San Francisco Planning Department

2.0 REGIONAL OVERVIEW

San Francisco has diverse linkages to the region, as well as to the state, national, and global economy. This chapter supplies basic demographic and economic information about the San Francisco Bay Area's nine counties. This information gives an understanding of San Francisco's economic base within a regional and historical context. The period of time covered ranges from 1997 to 2006.

The nine counties in San Francisco Bay Area are: Alameda, Contra Costa, Marin, Napa, San Francisco, San Mateo, Santa Clara, Solano, and Sonoma. Map 2.1 shows the location of these counties, which have been grouped into four sub-regions: North Bay, East Bay, South Bay, and San Francisco. These sub-regions were initially formed in 1985 on the basis of observed travel patterns of commuters into San Francisco and availability of employment information. Although travel patterns have evolved since the initial observations, these sub-regions have been retained in order to maintain the consistency of the data structure in this chapter. The North Bay includes Marin, Sonoma, Napa, and Solano counties. The East Bay includes Contra Costa and Alameda counties. The South Bay includes Santa Clara and San Mateo counties.

The regional subdivision allows comparisons between San Francisco, North Bay, East Bay, and South Bay areas that represent the labor force base for San Francisco and the region. When reviewing the tables in this chapter, it is important to note that the Bay Area covers 7,041 square miles in total. The North Bay represents 53 percent of that total, the East

MAP 2.1 BAY AREA COUNTIES AND SUB-REGIONS



Bay 21 percent, the South Bay 25 percent, and San Francisco less than one percent of land area in the region. Population densities in San Francisco are by far the highest in the Bay Area.

This chapter presents two sets of tables and graphs. The first set reports population, labor force, employment, and unemployment by sub-region. These con-

cepts are described below. This data is focused on the residents of each county. For context, unemployment data is also provided for California and the United States as a whole. The second set describes regional employment for each sub-region by industry groups from 1997 to 2006. This data is focused on those that work in each county, independent of where they live.

Each economic indicator is reported in absolute numbers, annual percentage distribution, and percentage change over time. Unemployment figures are presented in terms of average annual rates.

- **Population** is defined as the total number of people who live in a specific area, such as a particular county or city. Population data from 1997 to 2006 come from the California State Department of Finance (DOF). These data are based on the 1990 and 2000 Census numbers with yearly updates which take into account city/county surveys of building permits, construction activity, and overall housing stock; tallying of administrative records from local, state, and federal agencies including driver's license data, school registration, and birth and death certificate records; and tracking the status of military bases.
- **Labor Force** consists of persons who are either working or looking for work, excluding members of the armed forces. Labor force data are based on place of residence. For example, a worker who lives in the East Bay is part of the East Bay labor force, no matter where he or she is employed. Labor force data are obtained from the California Employment Development Department (EDD).
- **Employment**, as used in this inventory and defined by EDD, includes persons who were either at work or temporarily absent from work due to illness, vacation, strike, or other personal reasons. Employment data are collected by place of work. Someone holding a job in San Francisco is part of the San Francisco employment pool no matter where he or she lives. These data do not include self-employed, unpaid family workers, domestics, volunteers, or persons involved in trade disputes.

- **Unemployment** is defined as civilians 16 years and older, not at work, who were actively looking for work during the last four weeks, and were available to accept a job or who were waiting to be called back to jobs from which they had been laid off. Civilian unemployment data are based on place of residence. The unemployment data are from EDD, the United States Department of Commerce, and U.S. Census Bureau.

Employment data reported by industry group are based on EDD data. These data are organized by using the North American Industry Classification System (NAICS), as discussed in Chapter 1.

San Francisco's Residents in a Regional Context

- *Table 2.1.1 Bay Area Population by Sub-Region, 1997-2006* — San Francisco has grown to an estimated 809,000 people in 2006, an addition of 10,000 people from 2005. The rest of the Bay Area continues to grow with the region adding 90,000 new residents. San Francisco trailed only the South Bay in the rate of growth over the last year.
- *Table 2.1.2 Bay Area Labor Force by Sub-Region, 1997-2006* — The number of San Francisco residents in the labor force increased after five consecutive years of decline: some 32,000 San Franciscans joined the labor force in 2006. Regionally, both the North Bay and South Bay are growing at faster rates, two and three times the rate of San Francisco respectively.
- *Table 2.1.3 Bay Area Employed Residents by Sub-Region, 1997-2006* — Bay Area employed residents continued to increase with the addition of 55,000 in 2006. This growth has accelerated with more than double the increase from 2004-2005. After four consecutive years of decline, the number of employed Bay Area residents picked up in 2005; however, the region is still lags the 2000 high by more than 10%.
- *Table 2.1.4 Bay Area Unemployed Residents by Sub-Region, 1997-2006* — Unemployment rate in

San Francisco dropped almost 18% to 4.2%, continuing a downward trend since 2003. Similar decreases were seen throughout the Bay Area. Regionwide, the unemployment rate fell to 4.3% as 23,000 fewer people were unemployed.

People Who Work in San Francisco in a Regional Context

- *Tables 2.2.1 Bay Area Employment by Industry Group, 1997-2006* — Regionwide, Manufacturing jobs have been declining since 2000. Conversely, Educational and Health Services jobs have been growing since 2000. Job growth in the Professional and Business Services group has accelerated since 2003.
- *Tables 2.2.2 Bay Area Employment by Industry Group and Sub-Region, 1997-2006 – Number of Jobs* — San Francisco's share of the region's employment has remained around 16% for at least ten years.
- *Tables 2.2.3 Bay Area Employment by Industry Group and Sub-Region, 1997-2006 – Percent of Regional Distribution* — Relative to the region, there were no substantial shifts in the percentage distribution of industries.
- *Tables 2.2.4 Bay Area Employment by Industry Group and Sub-Region, 1997-2006 – Annual Percentage Change* — Relative to the region, there were no substantial shifts in the percentage change of industries. However, San Francisco's Manufacturing employment has declined in each of the last ten years.

TABLE 2.1.1 BAY AREA POPULATION BY SUB-REGION, 1997-2006

This table presents the number of residents in each Bay Area sub-region for the last ten years, as well as the percentage distribution in any given year across the Bay Area and the annual change within each sub-region. Population trends are shown in Figure 2.1.1 below.

Population by Sub-Region

Number of Persons (000s)	1997	1998	1999	2000	2001	2002	2003	2004	2005	2006
North Bay	1,165	1,190	1,206	1,226	1,249	1,255	1,271	1,276	1,291	1,299
East Bay	2,255	2,309	2,350	2,384	2,451	2,468	2,502	2,506	2,540	2,568
South Bay	2,354	2,405	2,438	2,467	2,444	2,437	2,444	2,460	2,497	2,542
San Francisco	778	790	791	801	794	794	792	795	799	809
TOTAL	6,426	6,499	6,540	6,854	6,919	6,933	6,969	7,036	7,126	7,217

Percentage Distribution	1997	1998	1999	2000	2001	2002	2003	2004	2005	2006
North Bay	18.1	18.3	18.4	17.9	18.0	18.1	18.2	18.1	18.1	18.0
East Bay	35.1	35.5	35.9	34.8	35.4	35.6	35.9	35.6	35.6	35.6
South Bay	36.6	37.0	37.3	36.0	35.3	35.1	35.1	35.0	35.0	35.2
San Francisco	12.1	12.1	12.1	11.7	11.5	11.4	11.4	11.3	11.2	11.2
TOTAL	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0

Percentage Change	1997-98	1998-99	1999-00	2000-01	2001-02	2002-03	2003-04	2004-05	2005-06
North Bay	2.1	1.4	1.6	1.9	0.5	1.3	0.4	1.2	0.6
East Bay	2.4	1.8	1.5	2.8	0.7	1.4	0.2	1.3	1.1
South Bay	2.2	1.4	1.2	-0.9	-0.3	0.3	0.7	1.5	1.8
San Francisco	1.5	0.1	1.4	-1.0	-0.0	-0.2	0.4	0.5	1.3
TOTAL	1.1	0.6	4.8	0.9	0.2	0.5	1.0	1.3	1.3

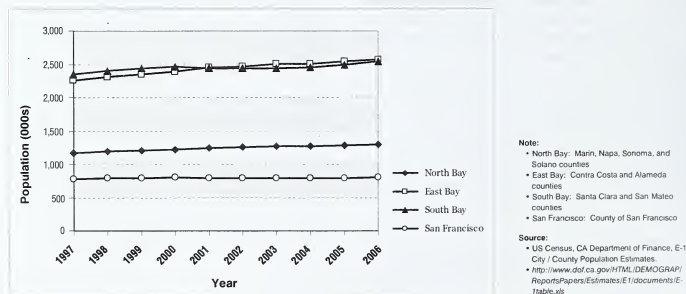
FIGURE 2.1.1 BAY AREA POPULATION BY SUB-REGION, 1997-2006

TABLE 2.1.2 BAY AREA LABOR FORCE BY SUB-REGION, 1997-2006

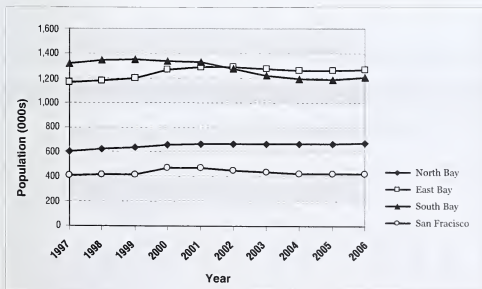
This table presents the number of residents in the labor force in each Bay Area sub-region for the last ten years. Also included is the percentage distribution in any given year across the Bay Area and the annual change within each sub-region. Labor force trends are shown in Figure 2.1.2 below.

Residents in the Labor Force by Sub-Region

Number of Persons (000s)	1997	1998	1999	2000	2001	2002	2003	2004	2005	2006
North Bay	606	621	635	660	665	667	665	666	666	668
East Bay	1,162	1,181	1,201	1,270	1,287	1,288	1,273	1,259	1,259	1,260
South Bay	1,314	1,345	1,354	1,338	1,333	1,271	1,221	1,194	1,194	1,188
San Francisco	408	415	418	473	469	450	433	422	422	421
TOTAL	3,490	3,562	3,608	3,740	3,754	3,677	3,592	3,541	3,541	3,536

Percentage Distribution	1997	1998	1999	2000	2001	2002	2003	2004	2005	2006
North Bay	17.4	17.4	17.6	17.7	17.7	18.2	18.5	18.8	18.8	18.9
East Bay	33.3	33.2	33.3	33.9	34.3	35.0	35.4	35.6	35.6	35.6
South Bay	37.6	37.8	37.5	35.8	35.5	34.6	34.0	33.7	33.7	33.6
San Francisco	11.7	11.6	11.6	12.6	12.5	12.2	12.1	11.9	11.9	11.9
TOTAL	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0

Percentage Change	1997-98	1998-99	1999-00	2000-01	2001-02	2002-03	2003-04	2004-05	2005-06
North Bay	2.6	2.2	4.0	0.8	0.3	-0.4	0.1	0.4	1.0
East Bay	1.6	1.7	5.7	1.3	0.1	-1.2	-1.1	0.0	0.4
South Bay	2.4	0.7	-1.2	-0.4	-4.6	-3.9	-2.3	-0.5	1.5
San Francisco	1.6	0.8	13.1	-0.7	-4.0	-3.9	-2.5	-0.4	0.5
TOTAL	2.0	1.3	3.7	0.4	-2.1	-2.3	-1.4	-0.1	0.9

FIGURE 2.1.2 BAY AREA LABOR FORCE BY SUB-REGION, 1997-2006

Note:

- North Bay: Marin, Napa, Sonoma, and Solano counties
- East Bay: Contra Costa and Alameda counties
- South Bay: Santa Clara and San Mateo counties
- San Francisco: County of San Francisco

Source:

- CA Employment Development Department, annual averages (not seasonally adjusted)
- <http://www.labormarketing.ca.gov/cgi/databrowser/?PAGEID=4&SUBID=131>

TABLE 2.1.3 BAY AREA EMPLOYED RESIDENTS BY SUB-REGION, 1997-2006

This table presents the number of employed residents in each Bay Area sub-region for the last ten years. Also included is the percentage distribution in any given year across the Bay Area and the annual change within each sub-region. Employment trends are shown in Figure 2.1.3 below.

Employed Residents by Sub-Region

Number of Persons (000s)	1997	1998	1999	2000	2001	2002	2003	2004	2005	2006
North Bay	578	597	614	636	639	633	628	631	638	647
East Bay	1,111	1,134	1,162	1,224	1,229	1,206	1,188	1,186	1,196	1,210
South Bay	1,275	1,304	1,317	1,297	1,269	1,174	1,127	1,121	1,127	1,154
San Francisco	392	399	405	457	445	419	403	397	399	405
TOTAL	3,356	3,435	3,498	3,614	3,583	3,431	3,346	3,335	3,360	3,415

Percentage Distribution	1997	1998	1999	2000	2001	2002	2003	2004	2005	2006
North Bay	17.2	17.4	17.6	17.6	17.8	18.4	18.8	18.9	19.0	18.9
East Bay	33.1	33.0	33.2	33.9	34.3	35.2	35.5	35.6	35.6	35.4
South Bay	38.0	38.0	37.6	35.9	35.4	34.2	33.7	33.6	33.5	33.8
San Francisco	11.7	11.6	11.6	12.6	12.4	12.2	12.0	11.9	11.9	11.9
TOTAL	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0

Percentage Change	1997-98	1998-99	1999-00	2000-01	2001-02	2002-03	2003-04	2004-05	2005-06
North Bay	3.4	2.9	3.6	0.5	-1.1	-0.8	0.6	1.0	1.4
East Bay	2.1	2.4	5.4	0.4	-1.8	-1.5	-0.2	0.8	1.1
South Bay	2.3	1.0	-1.5	-2.1	-7.5	-4.0	-0.6	0.6	2.4
San Francisco	2.0	1.4	12.7	-2.4	-6.0	-3.7	-1.5	0.5	1.4
TOTAL	3.2	2.7	4.5	-1.0	-5.2	-3.1	-0.9	0.7	1.6

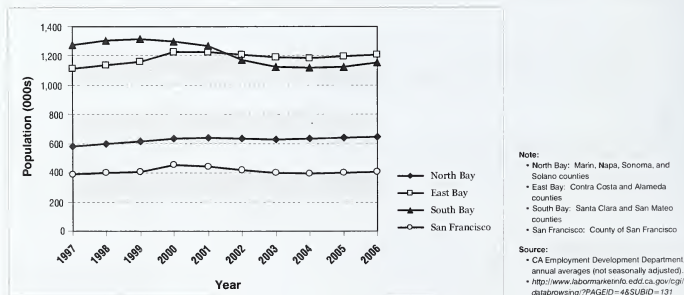
FIGURE 2.1.3 BAY AREA EMPLOYED RESIDENTS BY SUB-REGION, 1997-2006

TABLE 2.1.4 BAY AREA UNEMPLOYMENT BY SUB-REGION, 1997-2006

This table presents the number of unemployed residents in each Bay Area sub-region for the last ten years. Also included is the percentage distribution in any given year across the Bay Area and the annual change within each sub-region. Finally, this table also includes unemployment rates over the last ten years for each sub-region, as well as for California and the United States to provide context. Unemployment rate trends are shown in Figure 2.1.4 below.

Unemployment by Sub-Region

Number of Persons (000s)	1997	1998	1999	2000	2001	2002	2003	2004	2005	2006
North Bay	28	24	20	24	26	35	37	34	31	28
East Bay	51	47	40	46	58	82	84	73	64	56
South Bay	39	41	37	41	63	98	94	73	61	51
San Francisco	17	15	13	16	24	32	30	25	22	18
TOTAL	135	126	110	126	171	246	245	205	176	153

Annual Percentage Distribution	1997	1998	1999	2000	2001	2002	2003	2004	2005	2006
North Bay	20.6	18.9	18.3	18.8	15.1	14.2	15.1	16.7	17.4	18.5
East Bay	37.9	36.9	36.2	36.1	33.8	33.3	34.4	35.5	36.0	36.3
South Bay	29.1	32.1	33.8	32.3	37.0	39.7	38.4	35.6	34.4	33.5
San Francisco	12.5	12.1	11.7	12.7	14.0	12.9	12.1	12.3	12.2	11.7
TOTAL	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0

Percentage Change	1997-98	1998-99	1999-00	2000-01	2001-02	2002-03	2003-04	2004-05	2005-06
North Bay	-14.1	-15.5	18.4	8.8	34.4	6.3	-7.6	-10.2	-8.1
East Bay	-8.8	-14.6	14.9	27.0	41.3	3.1	-13.6	-12.8	-12.6
South Bay	3.3	-8.6	10.3	55.1	54.0	-3.4	-22.5	-16.8	-15.7
San Francisco	-8.9	-16.3	25.8	49.1	32.1	-6.0	-15.4	-14.7	-17.2
TOTAL	-6.4	-13.1	15.2	35.5	43.7	-0.2	-16.3	-14.0	-13.4

Average Annual Rate	1997	1998	1999	2000	2001	2002	2003	2004	2005	2006
North Bay	4.6	3.8	3.2	3.6	3.9	5.2	5.6	5.1	4.6	4.2
East Bay	4.4	3.9	3.3	3.6	4.5	6.4	6.6	5.8	5.0	4.4
South Bay	3.0	3.0	2.7	3.1	4.8	7.7	7.7	6.1	5.1	4.2
San Francisco	4.1	3.7	3.1	3.4	5.1	7.0	6.9	6.0	5.1	4.2
Average	3.9	3.5	3.0	3.4	4.6	6.7	6.8	5.8	5.0	4.3

Average Annual Rate	1997	1998	1999	2000	2001	2002	2003	2004	2005	2006
California	6.3	5.9	5.2	4.9	5.3	6.7	6.7	6.2	5.4	4.9
United States	5.0	4.5	4.2	4.0	4.8	5.8	6.0	5.5	5.1	4.6

Note:

- North Bay: Marin, Napa, Sonoma, and Solano counties
- East Bay: Contra Costa and Alameda counties
- South Bay: Santa Clara and San Mateo counties
- San Francisco: County of San Francisco

Sources:

- CA Employment Development Department, annual averages (not seasonally adjusted).
- <http://www.labormarketinfo.edd.ca.gov/cgi/data/browsing?PAGEID=45&SUBID=137>
- US Bureau of Labor Statistics
- http://www.bls.gov/cps/prev_yrs.htm

FIGURE 2.1.4 UNEMPLOYMENT RATE BY SUB-REGION, 1997-2006

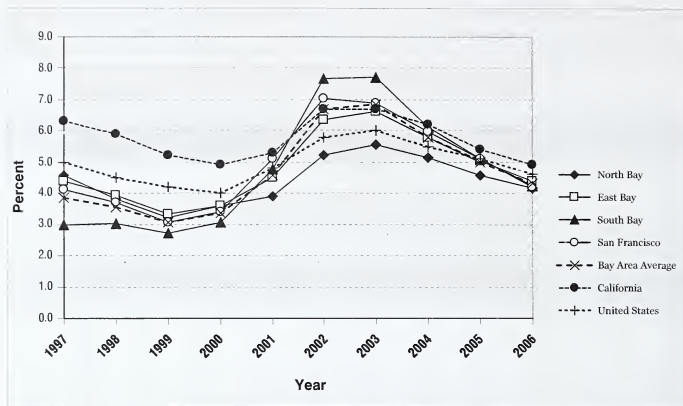


TABLE 2.2.1 BAY AREA EMPLOYMENT BY INDUSTRY GROUP, 1997-2006

This table presents information about those who work in the Bay Area. It conveys the number of people working in each industry group. The breakdown for each Bay Area sub-region is presented in Tables 2.2.2 - 2.2.4. All tables utilize NAICS industrial categories for the entire period of analysis.

Number of Jobs (000s)

Industry Group	1997	1998	1999	2000	2001	2002	2003	2004	2005	2006
Farm	26	26	26	27	28	27	26	25	23	20
Natural Resources, Mining, & Construction	147	160	177	191	198	187	191	188	194	196
Manufacturing	473	479	465	487	468	409	371	362	354	352
Trade, Transportation & Utilities	584	593	604	618	612	584	566	558	563	564
Information	102	110	122	152	147	127	117	114	112	113
Financial Activities	191	194	198	199	213	211	212	209	213	213
Professional & Business Services	551	588	622	671	620	542	517	518	530	550
Educational & Health Services	315	329	336	335	344	350	356	359	362	373
Leisure and Hospitality	278	284	291	299	306	302	303	307	312	322
Other Services	106	109	109	111	115	115	113	111	110	110
Government	441	442	454	468	471	485	477	467	471	473
TOTAL	3,212	3,314	3,404	3,557	3,523	3,339	3,248	3,218	3,245	3,286

Percentage Distribution

Industry Group	1997	1998	1999	2000	2001	2002	2003	2004	2005	2006
Farm	0.8	0.8	0.8	0.8	0.8	0.8	0.8	0.8	0.7	0.6
Natural Resources, Mining, & Construction	4.6	4.8	5.2	5.4	5.6	5.6	5.9	5.8	6.0	6.0
Manufacturing	14.7	14.5	13.7	13.7	13.3	12.3	11.4	11.2	10.9	10.7
Trade, Transportation & Utilities	18.2	17.9	17.7	17.4	17.4	17.5	17.4	17.3	17.3	17.2
Information	3.2	3.3	3.6	4.3	4.2	3.8	3.6	3.5	3.5	3.4
Financial Activities	5.9	5.9	5.8	5.6	6.1	6.3	6.5	6.5	6.6	6.5
Professional & Business Services	17.1	17.7	18.3	18.9	17.6	16.2	15.9	16.1	16.3	16.7
Educational & Health Services	9.8	9.9	9.9	9.4	9.8	10.5	10.9	11.1	11.2	11.4
Leisure and Hospitality	8.6	8.6	8.6	8.4	8.7	9.1	9.3	9.5	9.6	9.8
Other Services	3.3	3.3	3.2	3.1	3.3	3.5	3.5	3.5	3.4	3.3
Government	13.7	13.3	13.3	13.2	13.4	14.5	14.7	14.5	14.5	14.4
TOTAL	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0

Percentage Change

Industry Group	1997-98	1998-99	1999-00	2000-01	2001-02	2002-03	2003-04	2004-05	2005-06
Farm	2.4	-0.8	4.2	4.1	-3.2	-5.1	-1.6	-11.4	-10.2
Natural Resources, Mining, & Construction	9.3	10.5	7.8	3.7	-5.7	2.3	-1.8	3.5	0.9
Manufacturing	1.2	-2.8	4.6	-3.8	-12.6	-9.4	-2.4	-2.2	-0.5
Trade, Transportation & Utilities	1.6	1.8	2.3	-0.9	-4.6	-3.1	-1.4	0.7	0.3
Information	7.5	11.1	24.1	-3.2	-13.5	-7.9	-2.6	-1.4	0.1
Financial Activities	2.0	1.7	0.6	7.2	-0.9	0.0	-1.1	2.0	0.0
Professional & Business Services	6.8	5.7	7.9	-7.6	-12.6	-4.5	0.2	2.2	3.8
Educational & Health Services	4.4	2.1	-0.2	2.7	1.6	1.7	0.8	1.0	3.0
Leisure and Hospitality	2.3	2.5	2.7	2.4	-1.3	0.2	1.3	1.8	3.1
Other Services	2.5	0.0	1.8	3.3	0.3	-2.1	-1.4	-0.7	-0.5
Government	0.3	2.8	3.1	0.7	2.8	-1.6	-1.9	0.8	0.4
TOTAL	3.2	2.7	4.5	-1.0	-5.2	-2.7	-0.9	0.8	1.3

Source:

- California Employment Development Department, Industry Employment & Labor Force - by Annual Average; March Benchmark.
- <http://www.labormarketinfo.edd.ca.gov/cgi/databrowsering?PageID=4&SubID=171>

TABLE 2.2.2 BAY AREA EMPLOYMENT BY INDUSTRY GROUP AND SUB-REGION, 1997-2006 – NUMBER OF JOBS

This table contains the disaggregation of Table 2.2.1 by Bay Area sub regions.

Number of Jobs (000s)										
Total	1997	1998	1999	2000	2001	2002	2003	2004	2005	2006
North Bay	433	450	469	484	496	493	499	494	497	502
East Bay	950	978	1,010	1,047	1,058	1,043	1,029	1,024	1,036	1,048
South Bay	1,280	1,322	1,350	1,427	1,396	1,268	1,207	1,197	1,203	1,216
San Francisco	550	564	575	598	573	535	513	504	509	521
Regional Total	3,212	3,314	3,404	3,557	3,523	3,339	3,248	3,219	3,245	3,286
Farm										
North Bay	13	14	14	15	15	14	13	14	13	13
East Bay	2	2	2	2	3	3	3	3	2	2
South Bay	10	10	10	10	10	10	9	9	8	6
San Francisco	0	0	0	0	0	0	0	0	0	0
Regional Total	25	26	26	27	28	27	26	25	23	20
Natural Resources, Mining & Construction										
North Bay	26	28	32	35	37	38	46	40	42	41
East Bay	51	55	62	68	71	68	68	70	75	75
South Bay	54	60	65	69	70	64	60	61	61	63
San Francisco	16	17	18	19	20	18	17	17	17	18
Regional Total	147	160	177	191	198	187	191	188	194	196
Manufacturing										
North Bay	49	52	54	55	55	51	48	47	47	47
East Bay	111	115	112	117	113	104	98	99	95	97
South Bay	287	287	277	294	282	240	212	203	200	197
San Francisco	26	25	23	22	18	15	13	12	12	11
Regional Total	473	479	465	487	468	409	371	362	354	352
Trade, Transportation and Utilities										
North Bay	82	82	84	85	87	88	89	89	90	91
East Bay	193	196	203	208	210	205	197	193	195	195
South Bay	230	234	237	243	237	218	209	207	207	208
San Francisco	80	82	80	82	78	74	71	70	70	70
Regional Total	584	593	604	618	612	584	566	558	563	564
Information										
North Bay	10	11	11	11	11	11	10	10	9	8
East Bay	33	34	35	39	38	35	33	31	30	30
South Bay	39	43	50	67	68	58	54	54	55	57
San Francisco	20	22	26	35	30	24	21	20	18	18
Regional Total	102	110	122	152	147	127	117	114	112	113

TABLE 2.2.2 BAY AREA EMPLOYMENT BY INDUSTRY GROUP AND SUB-REGION, 1997-2006 – NUMBER OF JOBS (CONTINUED)

Number of Jobs (000s)

Financial Activities	1997	1998	1999	2000	2001	2002	2003	2004	2005	2006
North Bay	25	25	26	26	27	28	29	28	28	28
East Bay	49	49	50	51	59	63	68	67	71	69
South Bay	57	60	60	59	60	58	56	57	57	58
San Francisco	59	61	62	63	68	64	59	58	58	58
Regional Total	191	194	198	199	213	211	212	209	213	213
Professional and Business Services										
North Bay	46	50	54	57	56	54	53	55	55	59
East Bay	142	152	160	170	159	150	145	147	151	155
South Bay	239	256	273	299	276	227	216	216	219	225
San Francisco	124	131	134	144	130	112	103	101	105	111
Regional Total	551	588	622	671	620	542	517	518	530	550
Educational and Health Services										
North Bay	52	54	56	58	60	62	62	62	62	63
East Bay	100	106	109	111	113	115	117	118	119	122
South Bay	109	113	114	114	120	122	124	125	127	132
San Francisco	54	56	57	53	52	52	53	54	55	56
Regional Total	315	329	336	335	344	350	356	359	362	373
Leisure and Hospitality										
North Bay	45	47	48	50	52	53	54	54	54	55
East Bay	70	71	72	74	78	80	80	81	83	86
South Bay	97	98	100	103	104	100	99	102	104	107
San Francisco	65	68	71	72	72	70	70	71	72	74
Regional Total	278	284	291	299	306	302	303	307	312	322
Other Services										
North Bay	16	16	16	16	17	17	17	17	17	17
East Bay	30	31	31	32	36	38	38	37	36	36
South Bay	35	37	37	38	38	38	37	36	36	36
San Francisco	25	26	25	25	25	23	22	21	22	21
Regional Total	106	109	109	111	115	115	113	111	111	110
Government										
North Bay	70	72	75	76	80	80	79	79	81	82
East Bay	168	169	173	177	179	184	182	179	180	182
South Bay	123	124	128	131	132	136	132	128	128	126
San Francisco	80	77	79	84	81	84	84	82	83	84
Regional Total	441	442	454	468	471	485	477	467	471	473

Source:

- California Employment Development Department, Industry Employment & Labor Force - by Annual Average: March Benchmark.
- <http://www.labormarketinfo.edd.ca.gov/cgi/databrowse.cgi?PageID=46&SubID=171>

**TABLE 2.2.3 BAY AREA EMPLOYMENT BY INDUSTRY GROUP AND SUB-REGION, 1997-2006
– PERCENTAGE DISTRIBUTION BY SUB-REGION**

This table contains the percentage distribution across the Bay Area of the industry group data from Table 2.2.2.

Percentage Distribution by Sub-Region

Total	1997	1998	1999	2000	2001	2002	2003	2004	2005	2006
North Bay	13.5	13.6	13.8	13.6	14.1	14.8	15.4	15.3	15.3	15.3
East Bay	29.6	29.5	29.7	29.4	30.0	31.2	31.7	31.8	31.9	31.9
South Bay	39.9	39.9	39.7	40.1	39.6	38.0	37.2	37.2	37.1	37.0
San Francisco	17.1	17.0	16.9	16.8	16.3	16.0	15.8	15.7	15.7	15.9
Regional Total	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0

Farm

North Bay	51.0	52.1	52.5	54.1	53.4	52.6	51.6	53.1	55.6	62.9
East Bay	8.2	8.0	7.3	8.5	10.7	11.0	11.6	10.2	6.7	7.4
South Bay	40.0	38.7	39.4	36.3	35.2	35.3	35.7	35.0	37.3	28.2
San Francisco	0.8	1.1	0.8	1.1	0.7	1.1	1.2	1.6	0.4	1.5
Regional Total	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0

Natural Resources, Mining & Construction

North Bay	17.8	17.4	17.9	18.4	18.8	20.1	24.1	21.1	21.4	20.9
East Bay	35.0	34.6	35.2	35.5	36.0	36.3	35.6	37.5	38.7	38.1
South Bay	36.6	37.4	36.6	36.1	35.3	34.0	31.3	32.5	31.3	32.1
San Francisco	10.6	10.6	10.3	9.9	9.9	9.6	9.1	9.0	8.6	8.9
Regional Total	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0

Manufacturing

North Bay	10.3	10.9	11.5	11.2	11.7	12.5	12.9	13.1	13.2	13.2
East Bay	23.5	23.9	24.1	23.9	24.2	25.3	26.4	27.4	27.0	27.5
South Bay	60.7	59.9	59.4	60.4	60.3	58.5	57.1	56.2	56.5	56.1
San Francisco	5.6	5.3	5.0	4.4	3.8	3.7	3.5	3.4	3.3	3.2
Regional Total	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0

Trade, Transportation and Utilities

North Bay	14.0	13.9	14.0	13.7	14.2	15.0	15.8	16.0	16.0	16.1
East Bay	33.0	33.0	33.6	33.6	34.3	35.0	34.8	34.5	34.7	34.6
South Bay	39.3	39.4	39.2	39.4	38.7	37.3	36.8	37.0	36.8	36.9
San Francisco	13.7	13.8	13.3	13.3	12.7	12.7	12.6	12.5	12.4	12.4
Regional Total	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0

Information

North Bay	10.0	10.4	9.0	7.4	7.6	8.3	8.5	8.6	8.1	6.8
East Bay	31.9	31.2	28.6	25.7	25.7	27.7	27.9	27.2	27.0	26.5
South Bay	38.5	38.8	41.2	44.0	46.4	45.4	46.1	47.1	49.2	50.6
San Francisco	19.6	19.6	21.2	22.9	20.3	18.7	17.5	17.1	15.7	16.1
Regional Total	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0

TABLE 2.2.3 BAY AREA EMPLOYMENT BY INDUSTRY GROUP AND SUB-REGION, 1997-2006
 – PERCENTAGE DISTRIBUTION BY SUB-REGION (CONTINUED)

Percentage Distribution by Sub-Region

Financial Activities	1997	1998	1999	2000	2001	2002	2003	2004	2005	2006
North Bay	13.0	12.8	13.0	13.2	12.6	13.1	13.5	13.3	13.1	13.1
East Bay	25.8	25.1	25.3	25.4	27.5	29.6	32.0	32.1	33.1	32.3
South Bay	30.1	30.9	30.5	29.7	27.9	27.3	26.6	27.0	26.9	27.4
San Francisco	31.1	31.3	31.1	31.6	32.0	30.0	27.9	27.6	27.0	27.2
Regional Total	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0
Professional and Business Services										
North Bay	8.3	8.4	8.7	8.5	9.0	9.9	10.3	10.7	10.5	10.7
East Bay	25.8	25.8	25.8	25.4	25.7	27.6	28.0	28.3	28.4	28.2
South Bay	43.3	43.6	44.0	44.6	44.4	41.8	41.7	41.6	41.3	40.9
San Francisco	22.5	22.2	21.6	21.5	20.9	20.6	20.0	19.4	19.8	20.2
Regional Total	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0
Educational and Health Services										
North Bay	16.4	16.4	16.5	17.2	17.5	17.6	17.4	17.2	17.1	16.9
East Bay	31.8	32.2	32.5	33.1	32.7	32.8	32.9	32.9	32.7	32.7
South Bay	34.7	34.4	34.0	34.0	34.7	34.8	34.8	34.9	35.1	35.4
San Francisco	17.1	17.0	17.0	15.7	15.1	14.8	15.0	15.0	15.1	15.0
Regional Total	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0
Leisure and Hospitality										
North Bay	16.3	16.4	16.6	16.7	17.0	17.5	17.7	17.6	17.4	17.0
East Bay	25.3	24.9	24.9	24.6	25.4	26.4	26.5	26.3	26.4	26.6
South Bay	34.9	34.7	34.2	34.5	34.0	33.0	32.8	33.1	33.2	33.4
San Francisco	23.5	24.0	24.3	24.1	23.6	23.1	23.0	23.0	23.0	23.0
Regional Total	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0
Other Services										
North Bay	14.7	14.8	14.8	14.8	14.5	14.5	15.0	15.5	15.2	15.5
East Bay	28.4	28.0	28.4	28.7	31.2	32.8	33.2	33.3	32.4	32.7
South Bay	33.3	33.5	33.7	33.9	32.7	33.2	32.5	32.4	32.7	32.3
San Francisco	23.7	23.7	23.1	22.6	21.7	19.5	19.2	18.9	19.7	19.5
Regional Total	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0
Government										
North Bay	15.9	16.2	16.4	16.3	16.9	16.5	16.5	16.8	17.1	17.2
East Bay	38.1	38.2	38.1	37.7	38.0	38.0	38.3	38.3	38.2	38.5
South Bay	27.8	28.1	28.1	28.0	28.0	28.1	27.7	27.5	27.2	26.6
San Francisco	18.2	17.4	17.4	17.9	17.2	17.4	17.6	17.5	17.5	17.7
Regional Total	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0

Source:

- California Employment Development Department, Industry Employment & Labor Force - by Annual Average; March Benchmark.
- <http://www.labormarketinfo.edd.ca.gov/cgi-bin/ds/browsing?PageID=4&SubID=171>

TABLE 2.2.4 BAY AREA EMPLOYMENT BY INDUSTRY GROUP AND SUB-REGION, 1997-2006 – ANNUAL PERCENTAGE CHANGE

This table contains the annual percentage change in employment by industry group within each sub-region of the Bay Area.

Percentage Change									
Total	1997-98	1998-99	1999-00	2000-01	2001-02	2002-03	2003-04	2004-05	2005-06
North Bay	4.0	4.2	3.4	2.5	-0.6	1.2	-1.0	0.6	1.0
East Bay	3.0	3.2	3.7	1.0	-1.4	-1.4	-0.4	1.1	1.2
South Bay	3.3	2.2	5.7	-2.2	-9.1	-4.8	-0.8	0.5	1.1
San Francisco	2.6	2.0	4.1	-4.2	-6.7	-4.1	-1.8	1.1	2.3
Regional Total	3.2	2.7	4.5	-1.0	-5.2	-2.7	-0.9	.08	1.3
Farm									
North Bay	4.6	0.0	7.4	2.7	-4.7	7.0	1.5	-7.4	1.6
East Bay	0.0	-9.5	21.1	30.4	0.0	0.0	13.3	-42.3	0.0
South Bay	-1.0	1.0	-3.9	1.0	-3.0	4.2	-3.3	-5.6	-32.1
San Francisco	50.0	-33.3	50.0	-33.3	50.0	0.0	33.3	-75.0	200.0
Regional Total	2.4	-0.8	4.2	4.1	-3.2	-5.1	-1.6	-11.4	-10.2
Natural Resources, Mining & Construction									
North Bay	6.9	13.6	11.0	5.7	0.8	22.7	-14.1	5.3	-1.4
East Bay	8.0	12.5	9.0	5.0	4.9	0.3	3.4	6.8	-0.7
South Bay	11.5	8.2	6.5	1.2	8.9	6.0	1.8	0.2	3.5
San Francisco	9.7	7.6	3.3	4.2	-9.1	0.0	0.0	0.0	4.8
Regional Total	9.3	10.5	7.8	3.7	-5.7	2.3	-1.8	3.5	0.9
Manufacturing									
North Bay	7.2	2.9	2.1	0.4	-6.9	6.3	1.3	-1.1	-0.4
East Bay	3.2	-2.2	3.9	-2.8	8.5	-5.4	1.1	-3.7	1.6
South Bay	-0.0	-3.7	6.3	-4.0	-15.2	-11.6	-4.0	-1.7	-1.2
San Francisco	-4.2	-8.3	-6.5	17.6	-15.2	13.2	-6.9	3.3	5.9
Regional Total	1.2	-2.8	4.6	-3.8	-12.6	-9.4	-2.4	-2.2	-0.5
Trade, Transportation and Utilities									
North Bay	1.0	2.4	0.7	2.6	0.7	1.8	0.1	0.8	0.6
East Bay	1.4	3.6	2.4	1.2	2.6	3.6	2.2	1.2	0.1
South Bay	1.7	1.5	2.6	-2.4	8.2	4.2	-1.1	0.3	0.6
San Francisco	2.3	2.0	2.4	4.9	4.9	4.0	-2.1	0.4	-0.4
Regional Total	1.6	1.8	2.3	-0.9	-4.6	-3.1	-1.4	0.7	0.3
Information									
North Bay	11.8	3.5	1.8	0.0	6.2	-4.8	2.0	-7.1	-15.4
East Bay	5.2	2.0	11.4	-3.3	6.6	7.4	-4.9	-1.9	-2.0
South Bay	8.4	17.8	32.8	1.9	-15.4	6.4	0.4	3.0	2.9
San Francisco	7.5	19.9	34.0	-14.1	-20.5	13.5	-4.9	-9.7	2.8
Regional Total	7.5	11.1	24.1	-3.2	-13.5	-7.9	-2.6	-1.4	0.1

TABLE 2.2.4 BAY AREA EMPLOYMENT BY INDUSTRY GROUP AND SUB-REGION, 1997-2006 – ANNUAL PERCENTAGE CHANGE (CONTINUED)

Percentage Change

Financial Activities	1997-98	1998-99	1999-00	2000-01	2001-02	2002-03	2003-04	2004-05	2005-06
North Bay	0.4	4.0	1.9	2.3	3.0	2.9	-2.5	0.4	0.4
East Bay	-0.8	2.5	1.2	15.8	6.7	8.3	-0.7	4.9	-2.1
South Bay	4.5	0.7	-2.2	0.8	-3.2	-2.6	0.5	1.6	1.7
San Francisco	2.5	1.3	2.1	8.4	-6.9	-6.9	-2.4	-0.3	0.9
Regional Total	2.0	1.7	0.6	7.2	-0.9	0.0	-1.1	2.0	0.0

Professional and Business Services

North Bay	8.5	8.7	6.3	-3.0	-3.4	-0.9	3.9	0.2	6.1
East Bay	6.5	5.7	6.2	-6.6	-5.9	-3.1	1.2	2.7	2.9
South Bay	7.4	6.6	9.5	-7.9	-17.7	-4.9	0.0	1.5	2.8
San Francisco	5.2	2.8	7.5	-10.1	-14.0	-7.3	-2.8	4.3	5.9
Regional Total	6.8	5.7	7.9	-7.6	-12.6	-4.5	0.2	2.2	3.8

Educational and Health Services

North Bay	4.1	3.2	3.8	4.3	2.3	0.5	-0.2	0.6	1.4
East Bay	5.7	3.2	1.4	1.6	2.0	2.0	0.8	0.6	2.8
South Bay	3.5	0.8	0.0	4.8	1.8	1.6	1.3	1.4	4.1
San Francisco	3.9	1.8	-7.6	-1.3	-0.4	2.9	1.1	1.5	2.6
Regional Total	4.4	2.1	-0.2	2.7	1.6	1.7	0.8	1.0	3.0

Leisure and Hospitality

North Bay	2.9	3.9	2.9	4.4	1.5	1.5	0.7	0.4	1.3
East Bay	0.9	2.3	1.8	5.7	2.6	0.6	0.2	2.5	3.8
South Bay	1.5	1.2	3.7	0.9	-4.4	-0.3	2.3	2.1	3.6
San Francisco	4.6	3.8	2.1	0.0	-3.2	-0.4	1.3	1.8	3.1
Regional Total	2.3	2.5	2.7	2.4	-1.3	0.2	1.3	1.8	3.1

Other Services

North Bay	3.2	0.0	1.9	1.2	0.6	1.2	1.8	-2.3	1.2
East Bay	1.0	1.6	2.9	12.2	5.6	-0.8	-1.3	-3.2	0.3
South Bay	3.4	0.5	2.4	-0.5	1.9	-3.9	-1.9	0.3	-1.7
San Francisco	2.8	-2.7	-0.4	-0.8	-9.6	-3.6	-3.2	3.3	-1.4
Regional Total	2.5	0.0	1.8	3.3	0.3	-2.1	-1.4	-0.7	-0.5

Government

North Bay	2.0	4.3	2.4	4.5	0.0	-1.4	-0.3	2.5	1.4
East Bay	0.6	2.4	2.1	1.2	3.0	-1.0	-1.9	0.6	1.2
South Bay	1.5	2.7	2.8	0.4	3.3	-3.1	-2.7	-0.3	-1.8
San Francisco	-3.8	2.3	6.3	-3.6	4.5	-0.8	-2.5	1.2	1.5
Regional Total	0.3	2.8	3.1	0.7	2.8	-1.6	-1.9	0.8	0.4

Source:

- California Employment Development Department, Industry Employment & Labor Force - by Annual Average
- <http://www.labormarketinfo.edd.ca.gov/cgi/databrowse.sh?PageID=45&SubID=171>

3.0 EMPLOYMENT

This Chapter provides information about the employment trends in San Francisco from 1997 to 2006. The employment data presented in this chapter are based on the payroll jobs in San Francisco provided by the California Employment Development Department (EDD). The data are reported as annual average based on the quarterly average employment data. It is important to note that these employment data differ from the benchmark data provided by EDD on its web site (<http://www.calmis.cahwnet.gov>). The latter data omit private household employment data (NAICS 814) and are adjusted throughout the year.

Employment data are presented by the major economy sectors under each type of land use category. In 2001, economic sectors started being organized according to North American Industry Classification system (NAICS). From 1997 to 2000, economy sectors were organized according to Standard Industrial Classification system (SIC). Both industry classification systems are discussed in Chapter 1.2 – Data Formats. Table 1.2 in Chapter 1 shows the closest match between SIC economy sectors and NAICS economy sectors. It is not possible to get a 100% match between their industry groups because under the NAICS, certain industries have been moved from one economic sector to another. Due to restructuring of economic sectors, employment numbers may appear significantly higher or lower in certain economic sectors when compared to previous years' employment numbers.

Employment is defined as number of employees who were either at work or temporarily absent from work due to illness, vacation, strike, or other personal reasons. Employment data are collected by place of work. A person holding a job in San Francisco is part of the San Francisco employment pool regardless of his or her place of residence. A person holding more than one job is counted separately for each job. However, the EDD wage and salary employment data do not include self-employed persons, of which there were approximately 61,000 in 2005 according to the City of San Francisco's Office of the Treasurer and Tax Collector. The EDD wage and salary employment data also do not include unpaid family workers, volunteers, or persons involved in trade disputes.

Employment data is reported both for the entire city and the city's ten Commerce and Industry Districts under five Land Use categories - Office, Retail, Industrial, Hotel, and Cultural/Institutional/Educational (CIE). For an explanation of Land Use Category and Commerce and Industry District, refer to Chapter 1.2 - Data Formats.

Employment data reported by land use category will not be consistent with publications prior to 2001. Public administration jobs have been included in different land use categories in other publications. This publication includes public administration jobs in the 'Office' land use category for all years; necessary adjustments were made to data from previous

years. Public administration jobs were also classified as Office land use in the 2001 publication. From 1996-2000, public administration jobs were parsed out in Office, Industrial, and CIE land use categories.

Table 3.1 shows employment data by Land Use Category from 1997 to 2006. Tables 3.2.1 through 3.2.4 show employment data by Industry Group within each Land Use Category in San Francisco from 1997 to 2006. Table 3.3 presents San Francisco employment in its geographic context. It shows employment data by Land Use Category in ten Commerce and Industry Districts in San Francisco in 2006. It also shows employment under an 'Unclassified' category. This category represents home-based business establishments and organizations, particularly care-givers. These groups do not register a physical address with the State and thus are unable to be classified into a specific geographic district.

Employment by Land Use Category

- *Table 3.1 San Francisco Employment by Land Use Category, 1997-2006* — Almost all of the employment gain in 2006 was in the Office land use category. Hotel and retail land use categories also showed healthy job gains. Overall, the number of jobs in San Francisco increased by 2.4%. Only the industrial land use category showed a loss of jobs, although the rate of loss slowed somewhat over the past year.
- *Table 3.2.1 Office Employment by Industry Groups, 1997-2006* — Office services, by far the largest office group, posted a significant 9.2% gain in 2006. Real estate continued a slow upward trend in job growth while insurance and public administration continued a slow downward trend.
- *Table 3.2.2 Retail Employment by Industry Group, 1997-2006* — Within the retail land use category, growth patterns continued to fluctuate even as

all sub groups maintained approximately the same share of the industry in the last four years. Within this land use category, only the Food Stores and Other Retail Stores groups posted job losses in 2006. A strong rate of growth was seen in the General Merchandise, Personal and Repair Services, and Eating and Drinking Places groups.

- *Table 3.2.3 Industrial Employment by Industry Group, 1997-2006* — Within the industrial land use category, Printing and Publishing, Apparel Manufacturing, and Wholesale maintained a consistent share of employment. Food Manufacturing and Information groups experienced large losses, with both garnering double digit drops in number of jobs. The only groups experiencing growth were Construction and Other Manufacturing.
- *Table 3.2.4 Cultural/Institutional/Educational Employment by Industry Group, 1997-2006* — Within CIE, Educational Services continued its upward trend in jobs gain with an increase of 4.4% while Arts and Recreation and Social Assistance continued to lose their share of the industry and in actual employment. Health Care and Other CIE Services held steady their positions in employment and industry share of recent years.

Employment by Commerce & Industry District

- *Table 3.3 Employment by Commerce and Industry District and Land Use Category, 2006* — Most of the jobs are located in the Financial (31.8%) and South of Market (21.4%) districts. The Mission (2.8%), North Beach (3.2%), and Van Ness (3.2%) districts have the fewest number of jobs. Employment in the Unclassified district (jobs that are home-based) accounted for about 4% of the total jobs.

TABLE 3.1 SAN FRANCISCO EMPLOYMENT BY LAND USE CATEGORY, 1997-2006

This table contains the number of jobs in each of the five major non-residential land use categories in San Francisco. Data is presented from 1997-2006, although the 2001 switch in classification systems from SIC to NAICS means that it is inappropriate to directly compare between 1997-2000 data and 2001-2006 data (see Chapter 1.2 - Data Formats for a description of land use categories and an SIC-NAICS discussion). Also included is the percentage distribution in any given year and the annual change within each land use category. The data is also presented graphically below in Figures 3.1.1 (a snapshot of job distribution in 2006) and 3.1.2 (a look at ten-year trends).

Annual Average Number of Jobs

Land Use Category	1997	1998	1999	2000	2001	2002	2003	2004	2005	2006
Office	210,780	220,912	229,285	243,290	236,959	213,813	201,492	193,180	195,521	206,271
Retail	89,043	94,220	97,159	103,508	101,505	93,735	95,599	95,006	96,033	98,294
Industrial	118,866	120,961	117,588	116,540	107,837	97,860	93,726	89,037	84,693	81,699
Hotel	18,918	19,498	19,522	18,862	17,962	16,477	17,438	18,090	18,424	19,087
CIE	119,567	120,526	127,611	126,066	122,222	122,254	124,882	127,962	128,726	130,645
TOTAL	557,174	576,117	591,166	608,266	586,485	546,960	533,136	523,274	523,396	535,996

Annual Percentage Distribution

Land Use Category	1997	1998	1999	2000	2001	2002	2003	2004	2005	2006
Office	37.8	38.3	38.8	40.0	40.4	39.1	37.8	36.9	37.4	38.5
Retail	16.0	16.4	16.4	17.0	17.3	17.6	17.9	18.2	18.3	18.3
Industrial	21.3	21.0	19.9	19.2	18.4	17.9	17.6	17.0	16.2	15.2
Hotel	3.4	3.4	3.3	3.1	3.1	3.0	3.3	3.5	3.5	3.6
CIE	21.4	20.9	21.6	20.7	20.8	22.3	23.4	24.5	24.6	24.4
TOTAL	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0

Percentage Change

Land Use Category	1997-98	1998-99	1999-00	2000-01	2001-02	2001-02	2003-04	2004-05	2005-06
Office	4.8	3.8	6.1	N/A	-9.8	-5.8	-4.1	1.2	5.5
Retail	5.8	3.1	6.5	N/A	-4.9	-1.0	-0.6	1.1	2.4
Industrial	1.8	-2.8	-0.9	N/A	-9.3	-4.2	-5.0	-4.9	-3.5
Hotel	3.1	0.1	-3.4	N/A	-8.3	5.8	3.7	1.8	3.6
CIE	0.8	5.9	-1.2	N/A	0.0	2.1	2.5	0.6	1.5
TOTAL	3.2	2.6	2.9	N/A	-6.7	-2.5	-1.8	0.0	2.4

Note:

- CIE = Cultural, Institutional, or Educational
- Data through 2000 data based on SIC; 2001 and subsequent years are based on NAICS.
- N/A = Not Applicable, due to change in classification methodologies. See Chapter 1 for an explanation.
- From 1997-2005, annual average includes last quarter of previous year, and first three quarters of current year.

Sources:

- California Employment Development Department
- Data not publicly available
- Additional calculations by the San Francisco Planning Department

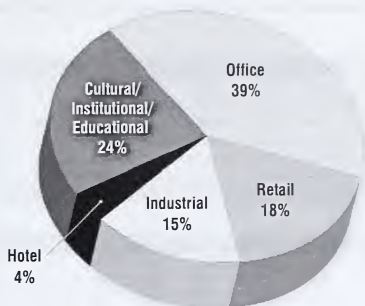
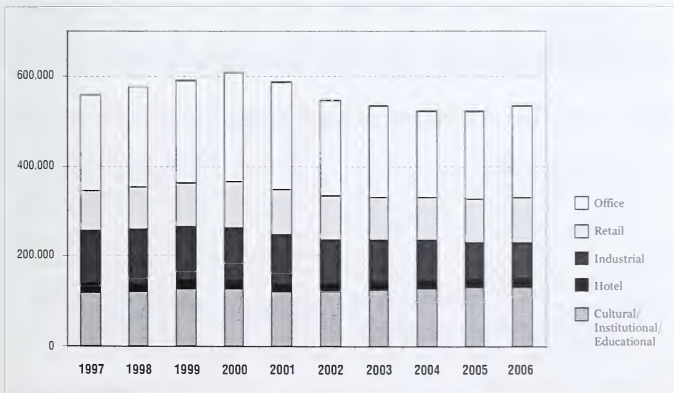
FIGURE 3.1.1 SAN FRANCISCO EMPLOYMENT BY LAND USE CATEGORY, 2006**FIGURE 3.1.2** SAN FRANCISCO EMPLOYMENT BY LAND USE CATEGORY, 1997-2006

TABLE 3.2.1 OFFICE EMPLOYMENT BY INDUSTRY GROUP, 1997-2006

This table presents job trends in the office land use category. Also included is the percentage distribution in any given year and the annual change within the office land use category. Figure 3.2.1 presents the job trends graphically.

Annual Average Number of Jobs

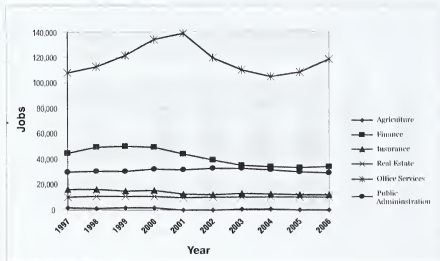
Industry Group	1997	1998	1999	2000	2001	2002	2003	2004	2005	2006
Agriculture	1,615	1,460	1,732	1,674	172	173	404	385	228	241
Finance	44,780	49,454	49,886	49,366	44,064	39,381	35,314	33,748	33,554	34,239
Insurance	16,356	16,083	14,855	15,448	12,417	12,070	12,897	12,527	12,174	11,962
Real Estate	10,296	10,953	10,741	10,576	9,763	9,866	10,177	9,910	10,033	10,316
Office Services	107,730	112,783	121,456	133,830	138,862	119,468	109,970	104,611	108,312	118,328
Public Administration	30,003	30,179	30,615	32,395	31,681	32,834	32,718	31,635	29,834	29,339
TOTAL	210,780	220,912	229,285	243,290	236,959	213,791	201,480	192,816	194,136	204,425

Annual Percentage Distribution

Industry Group	1997	1998	1999	2000	2001	2002	2003	2004	2005	2006
Agriculture	0.8	0.7	0.8	0.7	0.1	0.1	0.2	0.2	0.1	0.1
Finance	21.2	22.4	21.8	20.3	18.6	18.4	17.5	17.5	17.3	16.7
Insurance	7.8	7.3	6.5	6.3	5.2	5.6	6.4	6.5	6.3	5.9
Real Estate	4.9	5.0	4.7	4.3	4.1	4.6	5.1	5.1	5.2	5.0
Office Services	51.1	51.1	53.0	55.0	58.6	55.9	54.6	54.3	55.8	57.9
Public Administration	14.2	13.7	13.4	13.3	13.4	15.4	16.2	16.4	15.4	14.4
TOTAL	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0

Percentage Change

Industry Group	1997-98	1998-99	1999-00	2000-01	2001-02	2002-03	2003-04	2004-05	2005-06
Agriculture	-9.6	18.7	-3.4	N/A	0.9	133.3	-4.9	-40.8	5.8
Finance	10.4	0.9	-1.0	N/A	-10.6	-10.3	-4.4	-0.6	2.0
Insurance	-1.7	-7.6	4.0	N/A	-2.8	6.8	-2.9	-2.8	-1.7
Real Estate	6.4	-1.9	-1.5	N/A	1.0	3.2	-2.6	1.2	2.8
Office Services	4.7	7.7	10.2	N/A	-14.0	-8.0	-4.9	3.5	9.2
Public Administration	0.6	1.4	5.8	N/A	3.6	-0.4	-3.3	-5.7	-1.7
TOTAL	4.8	3.8	6.1	N/A	-9.8	-5.8	-4.3	0.7	5.3

FIGURE 3.2.1 OFFICE EMPLOYMENT BY INDUSTRY GROUP, 1997-2006**Note:**

- Data through 2000 data based on SIC; 2001 and subsequent years are based on NAICS.
- N/A = Not Applicable, due to change in classification methodologies. See Chapter 1 for an explanation.
- Sum is less than in Table 3.1 due to increased data suppression warranted by the smaller industrial scale of analysis.
- Sum is less than in Table 3.1 due to increased data suppression warranted by the smaller industrial scale of analysis.
- "Agriculture" refers to those working in offices whose line of work is related to agriculture.
- "Office Services" consists of the following:
 - Management of companies and enterprises
 - Professional, scientific, and technical Services
 - Administrative and support
 - Internet publishing & broadcasting
 - Internet, web search, & data processing services
 - Other information services

Sources:

- California Employment Development Department, SF County Employment and payroll by land use categories
- Data not publicly available
- Additional calculations by the San Francisco Planning Department

TABLE 3.2.2 RETAIL EMPLOYMENT BY INDUSTRY GROUP, 1997-2006

This table presents job trends in the retail land use category. Also included is the percentage distribution in any given year and the annual change within the retail land use category. Figure 3.2.2 presents the job trends graphically.

Annual Average Number of Jobs

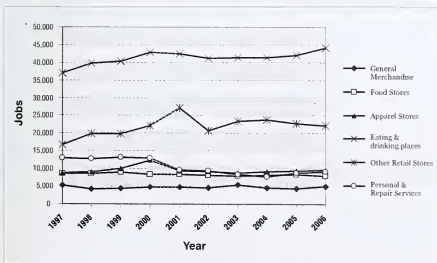
Industry Group	1997	1998	1999	2000	2001	2002	2003	2004	2005	2006
General Merchandise	5,162	4,219	4,372	4,800	4,736	4,631	5,543	4,662	4,401	4,921
Food Stores	8,487	8,555	9,041	8,448	8,311	8,210	8,051	8,144	8,394	7,940
Apparel Stores	8,721	9,077	10,135	12,259	9,348	9,209	8,871	9,285	9,509	9,698
Eating & Drinking Places	37,024	39,770	40,481	42,820	42,415	41,214	41,358	41,378	42,139	44,183
Other Retail Stores	16,744	19,814	19,893	22,174	27,165	20,762	23,356	23,859	22,794	22,247
Personal & Repair Services	12,905	12,785	13,237	13,006	9,531	9,349	8,419	7,678	8,795	9,306
TOTAL	89,043	94,220	97,159	103,508	101,505	93,375	95,598	95,006	96,033	98,294

Annual Percentage Distribution

Industry Group	1997	1998	1999	2000	2001	2002	2003	2004	2005	2006
General Merchandise	5.8	4.5	4.5	4.6	4.7	5.0	5.8	4.9	4.6	5.0
Food Stores	9.5	9.1	9.3	8.2	8.2	8.8	8.4	8.6	8.7	8.1
Apparel Stores	9.8	9.6	10.4	11.8	9.2	9.9	9.3	9.8	9.9	9.9
Eating & Drinking Places	41.6	42.2	41.7	41.4	41.8	44.1	43.3	43.6	43.9	44.9
Other Retail Stores	18.8	21.0	20.5	21.4	26.8	22.2	24.4	25.1	23.7	22.6
Personal & Repair Services	14.5	13.6	13.6	12.6	9.4	10.0	8.8	8.1	9.2	9.5
TOTAL	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0

Percentage Change

Industry Group	1997-98	1998-99	1999-00	2000-01	2001-02	2002-03	2003-04	2004-05	2004-05
General Merchandise	-18.3	3.6	9.8	N/A	-2.2	19.7	-15.9	-5.6	11.8
Food Stores	0.8	5.7	-6.6	N/A	-1.2	-1.9	1.2	3.1	-5.4
Apparel Stores	4.1	11.7	21.0	N/A	-1.5	-3.7	4.7	2.4	2.0
Eating & Drinking Places	7.4	1.8	5.8	N/A	-2.8	0.3	0.0	1.8	4.9
Other Retail Stores	18.3	0.4	11.5	N/A	-23.6	12.5	2.2	-4.5	-2.4
Personal & Repair Services	-0.9	3.5	-1.7	N/A	-1.9	-9.9	-8.8	14.6	5.8
TOTAL	5.8	3.1	6.5	N/A	-8.0	2.4	-0.6	1.1	2.4

FIGURE 3.2.2 RETAIL EMPLOYMENT BY INDUSTRY GROUP, 1997-2006**Note:**

- Data through 2000 data based on SIC; 2001 and subsequent years are based on NAICS.
- N/A = Not Applicable, due to change in classification methodologies. See Chapter 1 for an explanation.
- Other Retail Stores include:
 - Motor vehicle parts and dealers
 - Electronics and appliance stores
 - Furniture and home furnishings stores
 - Miscellaneous retail stores
 - Rental and leasing services
 - Building material and garden equipment supply dealers
 - Health and Personal Care Stores
 - Gasoline Stations
 - Sporting Goods, Hobby, Book, and Music Stores
 - Non-store retailers

Sources:

- California Employment Development Department, SF County Employment and payroll by land use categories.
- Data not publicly available
- Additional calculations by the San Francisco Planning Department

TABLE 3.2.3 INDUSTRIAL EMPLOYMENT BY INDUSTRY GROUP, 1997-2006

This table presents job trends in the industrial land use category. Also included is the percentage distribution in any given year and the annual change within the industrial land use category. Figure 3.2.3 presents the job trends graphically.

Annual Average Number of Jobs

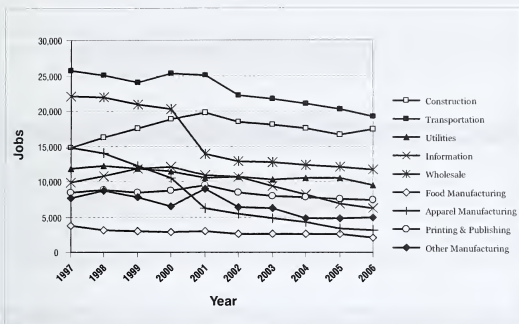
Industry Group	1997	1998	1999	2000	2001	2002	2003	2004	2005	2006
Construction	14,814	16,213	17,557	18,812	19,803	18,449	18,085	17,527	16,615	17,397
Transportation	25,660	25,053	24,081	25,313	25,118	22,170	21,653	21,099	20,222	19,204
Utilities	11,801	12,192	11,816	11,401	10,548	10,624	10,311	10,517	10,503	9,541
Information	9,934	10,782	11,861	12,101	10,897	10,603	9,415	8,226	6,930	6,189
Wholesale	22,042	22,006	20,855	20,263	13,872	12,792	12,754	12,306	12,087	11,729
Food Manufacturing	3,756	3,077	2,982	2,898	3,025	2,615	2,607	2,533	2,572	2,052
Apparel Manufacturing	14,754	14,056	12,197	10,574	6,220	5,396	4,779	4,256	3,387	3,172
Printing & Publishing	8,452	8,829	8,420	8,724	9,424	8,413	7,960	7,804	7,494	7,419
Other Manufacturing	7,653	8,753	7,819	6,452	8,931	6,411	6,171	4,747	4,815	4,921
TOTAL	118,866	120,961	117,588	116,540	107,837	97,473	93,735	89,014	84,623	81,625

Annual Percentage Distribution

Industry Group	1997	1998	1999	2000	2001	2002	2003	2004	2005	2006
Construction	12.5	13.4	14.9	16.1	18.4	18.9	19.3	19.7	19.6	21.3
Transportation	21.6	20.7	20.5	21.7	23.3	22.7	23.1	23.7	23.9	23.5
Utilities	9.9	10.1	10.0	9.8	9.8	10.9	11.0	11.8	12.4	11.7
Information	8.4	8.9	10.1	10.4	10.1	10.9	10.0	9.2	8.2	7.6
Wholesale	18.5	18.2	17.7	17.4	12.9	13.1	13.6	13.8	14.3	14.4
Food Manufacturing	3.2	2.5	2.5	2.5	2.8	2.7	2.8	2.8	3.0	2.5
Apparel Manufacturing	12.4	11.6	10.4	9.1	5.8	5.5	5.1	4.8	4.0	3.9
Printing & Publishing	7.1	7.3	7.2	7.5	8.7	8.6	8.5	8.8	8.9	9.1
Other Manufacturing	6.4	7.2	6.6	5.5	8.3	6.6	6.6	5.3	5.7	6.0
TOTAL	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0

Percentage Change

Industry Group	1997-98	1998-99	1999-00	2000-01	2001-02	2002-03	2003-04	2004-05	2005-06
Construction	9.4	8.3	7.1	N/A	-6.8	-2.0	-3.1	-5.2	4.7
Transportation	-2.4	-3.9	5.1	N/A	-11.7	-2.3	-2.6	-4.2	-5.0
Utilities	3.3	-3.1	-3.5	N/A	0.7	-2.9	2.0	-0.1	-9.2
Information	8.5	10.0	2.0	N/A	-2.7	-11.2	-12.6	-15.8	-10.7
Wholesale	-0.2	-5.2	-2.8	N/A	-7.8	-0.3	-3.5	-1.7	-3.0
Food Manufacturing	-18.1	-3.1	-2.8	N/A	-13.6	-0.3	-2.9	1.6	-20.2
Apparel Manufacturing	-4.7	-13.2	-13.3	N/A	-13.2	-11.4	-10.9	-20.4	-6.4
Printing & Publishing	4.5	-4.6	3.6	N/A	-10.7	-5.4	-2.0	-4.0	-1.0
Other Manufacturing	14.4	-10.7	-17.5	N/A	-28.2	-3.7	-23.1	1.4	2.2
TOTAL	1.8	-2.8	-0.9	N/A	-9.6	-3.8	-5.0	-4.9	-3.5

FIGURE 3.2.3 INDUSTRIAL EMPLOYMENT BY INDUSTRY GROUP, 1997-2006**Note:**

- Data through 2000 data based on SIC; 2001 and subsequent years are based on NAICS.
- N/A = Not Applicable, due to change in classification methodologies. See Chapter 1 for an explanation.
- Sum is less than in Table 3.1 due to increased data suppression warranted by the smaller industrial scale of analysis.
- Information Establishments include:
 - Broadcasting except internet
 - Telecommunications
- Other Manufacturing includes:
 - Lumber, furniture & fixtures, paper products
 - Chemicals and petroleum production
 - Rubber, leather, stone/clay/glass/concrete
 - Metal, industrial machinery & equipment
 - Electric and electronic manufacturing
 - Transportation equipment
 - Instruments, miscellaneous
 - Motion picture production & sound recording

Sources:

- California Employment Development Department, Quarterly Census.
- Data not publicly available
- Additional calculations by the San Francisco Planning Department

TABLE 3.2.4 CULTURAL/INSTITUTIONAL/EDUCATIONAL (CIE) EMPLOYMENT BY INDUSTRY GROUP, 1997-2006

This table presents job trends in the cultural/institutional/educational (CIE) land use category. Also included is the percentage distribution in any given year and the annual change within the CIE land use category. Figure 3.2.4 presents the job trends graphically.

Annual Average Number of Jobs

Industry Group	1997	1998	1999	2000	2001	2002	2003	2004	2005	2006
Art & Recreation	13,808	13,439	14,703	15,391	10,983	10,531	10,179	10,253	10,006	9,875
Health Care	35,558	35,874	36,193	33,011	33,766	34,190	34,336	35,720	36,222	36,910
Educational Services	38,922	38,279	40,988	41,779	41,697	42,587	44,145	45,529	46,507	48,539
Social Assistance	14,409	14,925	15,659	15,915	10,658	10,788	10,854	10,964	10,439	9,876
Other CIE Services	16,870	18,009	20,068	19,970	25,118	24,158	25,369	25,495	25,553	25,446
TOTAL	119,567	120,526	127,611	126,066	122,222	122,254	124,882	127,962	128,726	130,645

Annual Percentage Distribution

Industry Group	1997	1998	1999	2000	2001	2002	2003	2004	2005	2006
Art & Recreation	11.5	11.2	11.5	12.2	9.0	8.6	8.2	8.0	7.8	7.6
Health Care	29.7	29.8	28.4	26.2	27.6	28.0	27.5	27.9	28.1	28.3
Educational Services	32.6	31.8	32.1	33.1	34.1	34.8	35.3	35.6	36.1	37.2
Social Assistance	12.1	12.4	12.3	12.6	8.7	8.8	8.7	8.6	8.1	7.6
Other CIE Services	14.1	14.9	15.7	15.8	20.6	19.8	20.3	19.9	19.9	19.5
TOTAL	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0

Percentage Change

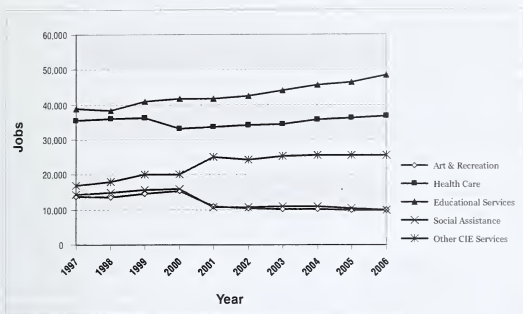
Industry Group	1997-98	1998-99	1999-00	2000-01	2001-02	2002-03	2003-04	2004-05	2005-06
Art & Recreation	-2.7	9.4	4.7	N/A	-4.1	-3.3	0.7	-2.4	-1.3
Health Care	0.9	0.9	-8.8	N/A	1.3	0.4	4.0	1.4	1.9
Educational Services	-1.7	7.1	1.9	N/A	2.1	3.7	3.1	2.1	4.4
Social Assistance	3.6	4.9	1.6	N/A	1.2	0.6	1.0	-4.8	-5.4
Other CIE Services	6.8	11.4	-0.5	N/A	-3.8	5.0	0.5	0.2	-0.4
TOTAL	0.8	5.9	-1.2	N/A	0.0	2.1	2.5	0.6	1.5

Note:

- Data through 2000 data based on SIC; 2001 and subsequent years are based on NAICS.
- N/A = Not Applicable, due to change in classification methodologies. See Chapter 1 for an explanation.
- Other CIE Services include:
 - Museums, historical sites, zoos, and parks
 - Membership associations and organizations
 - Private households
 - Private households constitute the majority of other CIE services.

Sources:

- California Employment Development Department, SF County Employment and payroll by land use categories
- Data not publicly available
- Additional calculations by the San Francisco Planning Department

FIGURE 3.2.4 CULTURAL/INSTITUTIONAL/EDUCATIONAL EMPLOYMENT BY INDUSTRY GROUP, 1997-2006**TABLE 3.3 EMPLOYMENT BY COMMERCE & INDUSTRY DISTRICT AND LAND USE CATEGORY, 2006**

This table presents the geographic distribution of jobs within San Francisco's eleven Commerce & Industry Districts, by land use category (see Chapter 1.2 – Data Formats for more on these districts)

Employment by Land Use Category and C&I District

C&I District	Office	Retail	Industrial	Hotel	CIE	TOTAL
Bayview	2,105	2,598	13,511	-	944	19,158
Civic Center	13,069	9,351	1,543	4,881	14,256	43,100
Financial	114,140	17,915	19,866	6,249	11,808	169,978
Mission	2,528	4,811	3,659	36	4,040	15,074
North Beach	3,394	8,160	1,536	1,389	2,758	17,237
North Central	5,229	9,201	1,145	729	38,938	55,242
Northwest	2,880	5,185	1,764	198	8,657	18,684
South of Market	45,845	19,700	29,073	3,984	16,019	114,621
Southwest	8,202	13,673	4,721	136	16,493	43,225
Van Ness	3,696	5,681	1,707	1,192	5,088	17,364
Unclassified	5,144	2,015	3,168	74	11,162	21,563
TOTAL	206,232	98,290	81,693	18,868	130,163	535,246

Note:

- CIE = Cultural/Institutional/Educational
- See Map 1.1 for San Francisco C & I district boundaries
- Sums may be less than in Table 3.1 due to increased data suppression warranted by the smaller geographic scale of analysis.

Sources:

- California Employment Development Department
- Data not publicly available
- Additional calculations by the San Francisco Planning Department

4.0 ESTABLISHMENTS

This Chapter provides information about the number and distribution of establishments in San Francisco. This data is gathered from the California Employment Development Department (EDD). Prior to 2002, this data was collected from different sources (primarily the San Francisco Office of the Tax Collector) that utilized substantially different criteria and methodologies. Therefore, data is not presented for years prior to 2002.

This chapter reports establishment data by the locations of business, production, or operations. A single company or owner may conduct operations or services at multiple locations; each location is included. The data does not include San Francisco businesses that are exempt from paying local business tax. All banks and insurance companies, government agencies, and various non-profit organizations are exempt from local business tax. Businesses that fail to file taxes are not included.

Establishment data is reported both for the entire city and the city's ten Commerce and Industry Districts by five Land Use categories - Office, Retail, Industrial,

Hotel, and Cultural/ Institutional/ Educational (CIE). For an explanation of Land Use Category and Commerce and Industry District, refer to Chapter 1.2 - Data Formats.

Table 4.1 shows establishment data by Land Use Category from 2002 to 2006. Tables 4.2.1 through 4.2.4 show establishment data by Industry Group within each Land Use Category in San Francisco from 2002 to 2006. Tables 4.3 and 4.4 present San Francisco establishments in geographic context. Table 4.3 shows the distribution of establishments throughout the City data by Land Use Category type. Table 4.4 shows the distribution of establishments throughout the City data by employer size. Both tables show a sizable number of establishments for whom the geographical location is not known. These have been placed under an Unclassified category. This category represents home-based business establishments and organizations, particularly care-givers. These groups do not register a physical address with the State and thus are unable to be classified into a specific geographic district.

Establishments by Land Use Category

- *Table 4.1 San Francisco Establishments by Land Use Category, 2002-2006* — The number of establishments increased in 2006 after two years of decline. There were increases in all land use categories except for Hotel with the number of establishments continuing to decline since 2003.
- *Table 4.2.1 Office Establishments by Industry Groups, 2002-2006* — Within office establishments, the number of Finance, Insurance, and Office Services firms increased, reversing a downward trend that started in 2002. Real Estate firms also continued to increase while Public Administration and Agriculture firms showed a decrease in numbers.
- *Table 4.2.2 Retail Establishments by Industry Groups, 2002-2006* — Retail establishments increased for the first time since 2002 with all industry groups except Food Stores and Other Retail reporting gains. Among retail groups, the gain was significant in the General Merchandise group with establishments increasing more than 25% in 2006.
- *Table 4.2.3 Industrial Establishments by Industry Groups, 2002-2006* — Overall, Industrial establishments also increased for the first time since 2002. Construction and Wholesale increased their share of all establishments in 2006. However, Apparel Manufacturing, Printing and Publishing, and Other Manufacturing firms continued decline as they have since 2002. Transportation and Utilities firms saw decreases after a brief recovery in 2004 and 2005.
- *Table 4.2.4 Cultural/Institutional/Educational Establishments by Industry Group, 2002-2006* — Overall CIE establishments continued to increase. Within CIE establishments, the source of the continued growth in both quantity and share comes from Other CIE Services, which largely consists of private household establishments. The only industry group showing a decrease in establishments in 2006 was Social Assistance.

Establishments by Commerce & Industry District

- *Table 4.3 Establishments by Commerce and Industry District and Land Use Category, 2006* — Though the number of establishments increased in 2006 after three years of decreases, trends differ by district. By far the largest increase in establishments has been in the Unclassified district, representing jobs that are home based and are geographically spread citywide. A full third of all establishments fall under this category. Geographic areas showing establishment gains in 2006 were the South of Market and Southwest districts.

Establishments by Size

- *Table 4.4 Establishments by Commerce and Industry District and Establishment Size, 2006* — The distribution of businesses by number of employees has remained relatively stable, with the vast majority remaining 0-4 employees. Geographically, the largest number of establishments — almost a third of all establishments — is in the Unclassified district, representing jobs that are home based and are spread citywide. As with most establishments, these geographically Unclassified firms employ less than four employees.

TABLE 4.1 SAN FRANCISCO ESTABLISHMENTS BY LAND USE CATEGORY, 2002-2006

This table contains the number of establishments in each of the five major non-residential land use categories in San Francisco. Data is presented from 2002-2006. Also included is the percentage distribution in any given year and the annual change within each land use category. The data is also presented graphically below in Figures 4.1.1 (a snapshot of establishment distribution in 2006) and 4.1.2 (a look at five-year trends).

Number of Establishments

Land Use Category	2002	2003	2004	2005	2006
Office	11,873	11,314	10,983	10,778	11,280
Retail	7,805	7,761	7,651	7,450	7,517
Industrial	5,341	5,122	4,984	4,826	4,847
Hotel	324	339	329	320	311
CIE	17,484	18,671	19,189	19,418	20,172
TOTAL	42,992	43,272	43,201	42,855	44,190

Annual Percentage Distribution

Land Use Category	2002	2003	2004	2005	2006
Office	27.6	26.1	25.4	25.1	25.5
Retail	18.2	17.9	17.7	17.4	17.0
Industrial	12.4	11.8	11.5	11.3	11.0
Hotel	0.8	0.8	0.8	0.7	0.7
CIE	40.7	43.1	44.4	45.3	45.6
TOTAL	100.0	100.0	100.0	100.0	100.0

Percentage Change

Land Use Category	2002-03	2003-04	2004-05	2005-06
Office	-4.7	-2.9	-1.9	4.7
Retail	-0.6	-1.4	-2.6	0.9
Industrial	-4.1	-2.7	-3.2	0.4
Hotel	4.6	-2.9	-2.7	-2.8
CIE	6.8	2.8	1.2	3.9
TOTAL	0.7	-0.2	-0.8	3.1

Note:

- CIE = Cultural/Institutional/Educational
- Totals also include some unclassified land uses

Sources:

- California Employment Development Department, SF County Employment
- Data not publicly available
- Additional calculations by the San Francisco Planning Department

FIGURE 4.1.1 SAN FRANCISCO ESTABLISHMENTS BY LAND USE CATEGORY, 2006



FIGURE 4.1.2 SAN FRANCISCO ESTABLISHMENTS BY LAND USE CATEGORY, 2002-2006

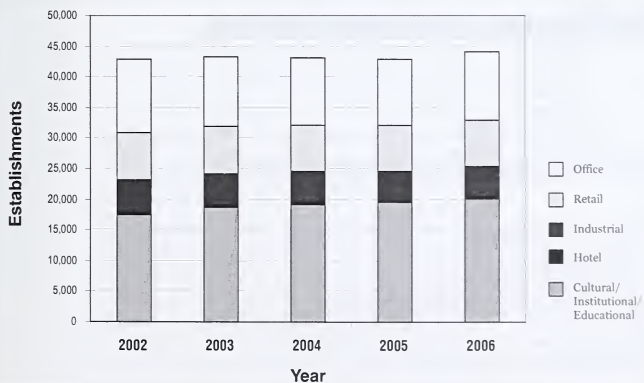


TABLE 4.2.1 OFFICE ESTABLISHMENTS BY INDUSTRY GROUP, 2002-2006

This table presents establishment trends in the office land use category. Also included is the percentage distribution in any given year and the annual change within the office land use category. Figure 4.2.1 presents the establishment trends graphically.

Number of Establishments

Industry Group	2002	2003	2004	2005	2006
Agriculture	29	42	41	38	37
Finance	1,494	1,485	1,455	1,438	1,464
Insurance	586	579	558	547	552
Real Estate	1,447	1,426	1,404	1,418	1,472
Office Services	7,913	7,384	7,132	6,937	7,371
Public Administration	396	393	394	401	380
TOTAL	11,865	11,307	10,983	10,778	11,275

Annual Percentage Distribution

Industry Group	2002	2003	2004	2005	2006
Agriculture	0.2	0.4	0.4	0.4	0.3
Finance	12.6	13.1	13.2	13.3	13.0
Insurance	4.9	5.1	5.1	5.1	4.9
Real Estate	12.2	12.6	12.8	13.2	13.1
Office Services	66.7	65.3	64.9	64.4	65.4
Public Administration	3.3	3.5	3.6	3.7	3.4
TOTAL	100.0	100.0	100.0	100.0	100.0

Percentage Change

Industry Group	2002-03	2003-04	2004-05	2005-06
Agriculture	44.8	-2.4	-7.9	-2.6
Finance	-0.6	-2.0	-1.2	1.8
Insurance	-1.2	-3.6	-1.9	0.9
Real Estate	-1.5	-1.5	1.0	3.8
Office Services	-6.7	-3.4	-2.7	6.3
Public Administration	-0.9	0.3	1.8	-5.2
TOTAL	-4.7	-2.9	-1.9	4.6

Note:

- Office Service consists of the following:
 - Management of companies and enterprises
 - Professional, scientific, and technical services
 - Administrative and support
 - Internet publishing & broadcasting
 - Internet, web search, & data processing services
 - Other information services
- Annual average includes last quarter of previous year, and first three quarters of current year.
- Sum is less than in Table 4.1 due to increased data suppression warranted by the smaller industrial scale of analysis.

Sources:

- California Employment Development Department, SF County Employment and payroll by land use categories
- Data not publicly available
- Additional calculations by the San Francisco Planning Department

FIGURE 4.2.1 OFFICE ESTABLISHMENTS BY INDUSTRY GROUP, 2002-2006

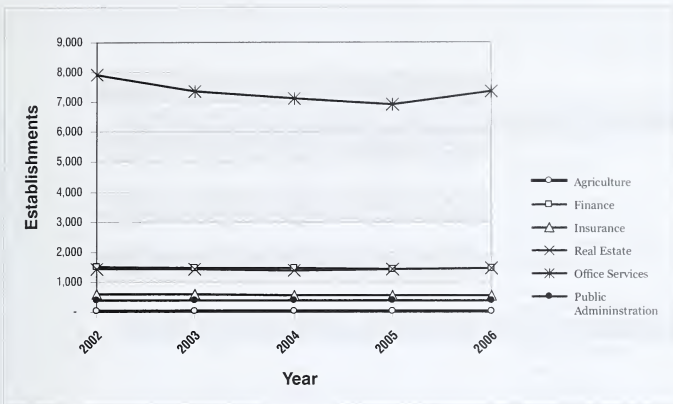


TABLE 4.2.2 RETAIL ESTABLISHMENTS BY INDUSTRY GROUP, 2002-2006

This table presents establishment trends in the retail land use category. Also included is the percentage distribution in any given year and the annual change within the retail land use category. Figure 4.2.2 presents the establishment trends graphically.

Number of Establishments

Industry Group	2002	2003	2004	2005	2006
General Merchandise	53	55	54	55	69
Food Stores	615	607	626	629	608
Apparel Stores	712	680	662	654	661
Eating & Drinking Places	2,827	2,900	2,866	2,780	2,858
Other Retail Services	2,296	2,204	2,163	2,097	2,068
Personal & Repair Services	1,301	1,256	1,280	1,235	1,255
TOTAL	7,805	7,701	7,651	7,450	7,517

Annual Percentage Distribution

Industry Group	2002	2003	2004	2005	2006
General Merchandise	0.7	0.7	0.7	0.7	0.9
Food Stores	7.9	7.9	8.2	8.4	8.1
Apparel Stores	9.1	8.8	8.7	8.8	8.8
Eating & Drinking Places	36.2	37.7	37.5	37.3	38.0
Other Retail Services	29.4	28.6	28.3	28.2	27.5
Personal & Repair Services	16.7	16.3	16.7	16.6	16.7
TOTAL	100.0	100.0	100.0	100.0	100.0

Percentage Change

Industry Group	2002-03	2003-04	2004-05	2005-06
General Merchandise	3.3	-1.8	1.9	25.1
Food Stores	-1.4	3.1	0.6	-3.4
Apparel Stores	-4.6	-2.5	-1.2	1.0
Eating & Drinking Places	2.6	-1.2	-3.0	2.8
Other Retail Services	-4.0	-1.9	-3.0	-1.4
Personal & Repair Services	-3.5	1.9	-3.5	1.6
TOTAL	-1.3	-0.6	-2.6	0.9

Note:

- Other Retail Stores include:
 - Motor vehicle parts and dealers
 - Electronics and appliance stores
 - Furniture and home furnishings stores
 - Miscellaneous retail stores
 - Rental and leasing services
 - Building material and garden equipment supply dealers
 - Health and personal care stores
 - Gasoline stations
 - Sporting goods, hobby, book, and music stores
 - Non-store retailers

Sources:

- California Employment Development Department, SF County Employment and payroll by land use categories
- Data not publicly available
- Additional calculations by the San Francisco Planning Department

FIGURE 4.2.2 RETAIL ESTABLISHMENTS BY INDUSTRY GROUP, 2002-2006

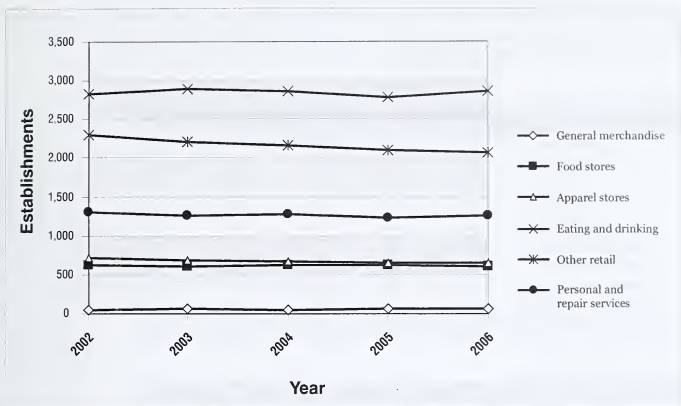


TABLE 4.2.3 INDUSTRIAL ESTABLISHMENTS BY INDUSTRY GROUP, 2002-2006

This table presents establishment trends in the industrial land use category. Also included is the percentage distribution in any given year and the annual change within the industrial land use category. Figure 4.2.3 presents the establishment trends graphically.

Number of Establishments

Industry Group	2002	2003	2004	2005	2006
Construction	1,722	1,697	1,678	1,647	1,708
Transportation	562	544	517	527	502
Utilities	22	23	26	26	25
Information	235	213	202	185	187
Wholesale	1,341	1,322	1,296	1,255	1,293
Food Manufacturing	179	168	160	155	152
Apparel Manufacturing	272	242	226	206	179
Printing & Publishing	463	424	406	376	358
Other Manufacturing	546	490	468	450	446
TOTAL	5,342	5,122	4,978	4,826	4,849

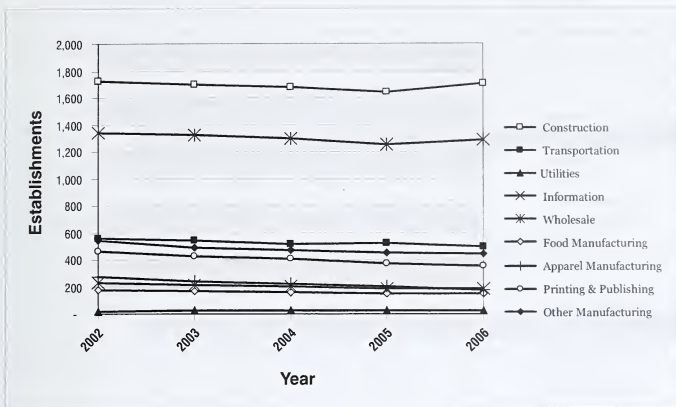
Annual Percentage Distribution

Industry Group	2002	2003	2004	2005	2006
Construction	32.2	33.1	33.7	34.1	35.2
Transportation	10.5	10.6	10.4	10.9	10.3
Utilities	0.4	0.4	0.5	0.5	0.5
Information	4.4	4.2	4.0	3.8	3.9
Wholesale	25.1	25.8	26.0	26.0	26.7
Food Manufacturing	3.4	3.3	3.2	3.2	3.1
Apparel Manufacturing	5.1	4.7	4.5	4.3	3.7
Printing & Publishing	8.7	8.3	8.2	7.8	7.4
Other Manufacturing	10.2	9.6	9.4	9.3	9.2
TOTAL	100.0	100.0	100.0	100.0	100.0

Percentage Change

Industry Group	2002-03	2003-04	2004-05	2005-06
Construction	-1.4	-1.1	-1.8	3.7
Transportation	-3.2	-5.1	2.0	-4.8
Utilities	5.0	14.3	1.0	-4.8
Information	-9.4	-5.4	-8.2	1.1
Wholesale	-1.4	-1.9	-3.2	3.1
Food Manufacturing	-6.1	-4.6	-3.1	-2.1
Apparel Manufacturing	-11.2	-6.3	-9.2	-12.9
Printing & Publishing	-8.4	-4.2	-7.5	-4.7
Other Manufacturing	-10.3	-4.5	-3.7	-0.9
TOTAL	-4.1	-2.8	-3.1	0.5

FIGURE 4.2.3 INDUSTRIAL ESTABLISHMENTS BY INDUSTRY GROUP, 2002-2006

**Note:**

- Information Establishments include:
 - Broadcasting except internet
 - Telecommunications
- Other Manufacturing includes:
 - Lumber, furniture & fixtures, paper products
 - Chemicals and petroleum production
 - Rubber, leather, stone/clay/glass/concrete
 - Instruments, miscellaneous
 - Metal, industrial machinery & equipment
 - Electric and electronic manufacturing
 - Transportation equipment
 - Motion picture production & sound recording

Sources:

- California Employment Development Department, SF County Employment and payroll by land use categories
- Data not publicly available
- Additional calculations by the San Francisco Planning Department

TABLE 4.2.4 CULTURAL/INSTITUTIONAL/EDUCATIONAL (CIE) ESTABLISHMENTS BY INDUSTRY GROUP, 2002-2006

This table presents establishment trends in the cultural/institutional/educational (CIE) land use category. Also included is the percentage distribution in any given year and the annual change within the CIE land use category. Figure 4.2.4 presents the establishment trends graphically.

Number of Establishments

Industry Group	2002	2003	2004	2005	2006
Art & Recreation	425	412	405	402	424
Health Care	2,059	2,070	2,066	2,025	2,086
Educational Services	962	972	910	699	699
Social Assistance	546	592	595	586	574
Other CIE Services	13,491	14,625	15,209	15,706	16,389
TOTAL	17,483	18,671	19,185	19,418	20,172

Annual Percentage Distribution

Industry Group	2002	2003	2004	2005	2006
Art & Recreation	2.4	2.2	2.1	2.1	2.1
Health Care	11.8	11.1	10.8	10.4	10.3
Educational Services	5.5	5.2	4.7	3.6	3.5
Social Assistance	3.1	3.2	3.1	3.0	2.8
Other CIE Services	77.2	78.3	79.3	80.9	81.2
TOTAL	100.0	100.0	100.0	100.0	100.0

Percentage Change

Industry Group	2002-03	2003-04	2004-05	2005-06
Art & Recreation	-3.1	-1.7	-0.7	5.5
Health Care	0.5	-0.2	-2.0	3.0
Educational Services	1.1	-6.4	-23.2	0.0
Social Assistance	8.5	0.4	-1.4	-2.1
Other CIE Services	8.4	4.0	3.3	4.4
TOTAL	6.8	2.8	1.2	3.9

Note:

- Other CIE Services includes:
 - Museums, historical sites, zoos, and parks
 - Membership associations and organizations
 - Private households
- Private households constitute the majority of other CIE services.

Sources:

- California Employment Development Department, SF County Employment and payroll by land use categories
- Data not publicly available
- Additional calculations by the San Francisco Planning Department

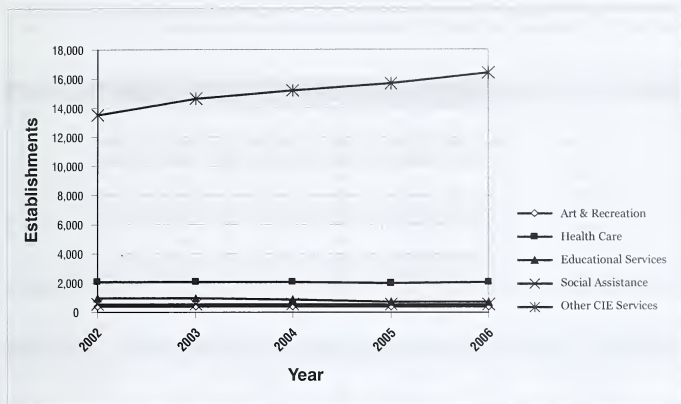
FIGURE 4.2.4 CULTURAL/INSTITUTIONAL/EDUCATIONAL ESTABLISHMENTS BY INDUSTRY GROUP, 2002-2006

TABLE 4.3 ESTABLISHMENTS BY COMMERCE & INDUSTRY DISTRICT AND LAND USE CATEGORY, 2006

This table presents the geographic distribution of establishments within San Francisco's eleven Commerce & Industry Districts, by land use category (see Chapter 1.2 – Data Formats for more on these Districts).

Number of Establishments

C&I District	Office	Retail	Industrial	Hotel	CIE	Other	TOTAL
Bayview	162	245	687	2	93	1	1,190
Civic Center	642	465	129	66	346	1	1,649
Financial	4,504	1,245	700	47	1,007	2	7,505
Mission	361	495	290	6	320	0	1,472
North Beach	385	529	150	25	189	0	1,278
North Central	819	898	253	46	1,042	2	3,060
Northwest	541	552	268	8	739	0	2,108
South of Market	1,567	1,080	1,117	43	455	2	4,264
Southwest	1,368	1,352	924	23	1,505	1	5,173
Van Ness	568	513	124	42	431	1	1,679
Unclassified	363	143	206	6	14,047	1	14,766
TOTAL	11,280	7,517	4,848	314	20,174	12	44,145

Percentage Distribution by C&I District

C&I District	Office	Retail	Industrial	Hotel	CIE	Other	TOTAL
Bayview	1.4	3.3	14.2	0.6	0.5	8.5	2.7
Civic Center	5.7	6.2	2.7	21.0	1.7	10.6	3.7
Financial	39.9	16.6	14.4	15.0	5.0	17.0	17.0
Mission	3.2	6.6	6.0	1.9	1.6	2.1	3.3
North Beach	3.4	7.0	3.1	8.0	0.9	0.0	2.9
North Central	7.3	11.9	5.2	14.6	5.2	17.0	6.9
Northwest	4.8	7.3	5.5	2.5	3.7	2.1	4.8
South of Market	13.9	14.4	23.0	13.7	2.3	17.0	9.7
Southwest	12.1	18.0	19.1	7.3	7.5	8.5	11.7
Van Ness	5.0	6.8	2.6	13.4	2.1	8.5	3.8
Unclassified	3.2	1.9	4.2	1.9	69.6	8.5	33.4
TOTAL	100.0	100.0	100.0	100.0	100.0	100.0	100.0

Percentage Distribution by Land Use Category

C&I District	Office	Retail	Industrial	Hotel	CIE	Other	TOTAL
Bayview	13.6	20.6	57.7	0.2	7.8	0.1	100.0
Civic Center	38.9	28.2	7.8	4.0	21.0	0.1	100.0
Financial	60.0	16.6	9.3	0.6	13.4	0.0	100.0
Mission	24.5	33.6	19.7	0.4	21.7	0.0	100.0
North Beach	30.1	41.4	11.7	2.0	14.8	0.0	100.0
North Central	26.8	29.3	8.3	1.5	34.1	0.1	100.0
Northwest	25.7	26.2	12.7	0.4	35.1	0.0	100.0
South of Market	36.7	25.3	26.2	1.0	10.7	0.0	100.0
Southwest	26.4	26.1	17.9	0.4	29.1	0.0	100.0
Van Ness	33.8	30.6	7.4	2.5	25.7	0.1	100.0
Unclassified	2.5	1.0	1.4	0.0	95.1	0.0	100.0
TOTAL	25.6	17.0	11.0	0.7	45.7	0.0	100.0

Note:

- CIE = Cultural/Institutional/Educational
- Tables 4.2.1-4 provide detailed information of various components of Office, Retail, Industrial and Cultural/Institutional/Educational, respectively.
- The total number of establishments in San Francisco reflects that there are 25 businesses whose use is unclassified.

Sources:

- California Employment Development Department, SF County Employment and payroll by land use categories
- Data not publicly available
- Additional calculations by the San Francisco Planning Department

TABLE 4.4 ESTABLISHMENTS BY COMMERCE & INDUSTRY DISTRICT AND SIZE CLASS, 2006

This table presents the geographic distribution of establishments within San Francisco's eleven Commerce & Industry Districts, by the size of the establishment (see Chapter 1.2 – Data Formats for more on these Districts).

Number of Employees

C&I District	0-4	5-9	10-19	20-49	50-99	100-249	250-499	500-999	1000+	TOTAL
Bayview	504	272	206	137	47	20	3	1	1	1,190
Civic Center	812	288	226	195	65	40	13	4	5	1,648
Financial	3,744	1,308	994	797	339	214	70	35	6	7,504
Mission	862	293	155	110	36	13	4	1	-	1,472
North Beach	695	236	159	118	44	22	4	1	-	1,277
North Central	1,967	486	315	201	54	24	5	2	6	3,060
Northwest	1,384	363	210	106	26	14	5	-	2	2,108
South of Market	2,032	788	604	512	179	95	29	11	14	4,262
Southwest	3,371	878	486	296	91	42	6	2	1	5,172
Van Ness	1,056	265	174	118	39	22	4	0	1	1,678
Unclassified	14,414	137	92	71	29	14	5	3	-	13,675
TOTAL	30,840	5,312	3,621	2,658	947	517	144	59	36	43,045

Percentage Distribution by C&I District

C&I District	0-4	5-9	10-19	20-49	50-99	100-249	250-499	500-999	1000+	TOTAL
Bayview	1.6	5.1	5.7	5.1	5.0	3.9	1.7	1.7	2.8	2.8
Civic Center	2.6	5.4	6.2	7.3	6.9	7.6	8.7	7.2	14.5	3.8
Financial	12.1	24.6	27.5	30.0	35.7	41.3	48.4	58.7	17.2	17.4
Mission	2.8	5.5	4.3	4.1	3.7	2.4	2.6	1.7	0.0	3.4
North Beach	2.3	4.4	4.4	4.4	4.6	4.2	2.9	1.7	0.0	3.0
North Central	6.4	9.2	8.7	7.6	5.7	4.6	3.1	2.6	16.6	7.1
Northwest	4.5	6.8	5.8	4.0	2.7	2.8	3.1	0.0	5.5	4.9
South of Market	6.6	14.8	16.7	19.3	18.9	18.3	19.9	18.3	38.6	9.9
Southwest	10.9	16.5	13.4	11.1	9.6	8.1	4.0	3.4	2.8	12.0
Van Ness	3.4	5.0	4.8	4.4	4.1	4.2	2.4	0.4	2.1	3.9
Unclassified	46.7	2.6	2.5	2.7	3.1	2.7	3.1	4.3	0.0	31.8
TOTAL	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0

Percentage Distribution by Size Class

C&I District	0-4	5-9	10-19	20-49	50-99	100-249	250-499	500-999	1000+	TOTAL
Bayview	42.3	22.8	17.3	11.5	4.0	1.7	0.2	0.1	7.6	100.0
Civic Center	49.3	17.5	13.7	11.8	4.0	2.4	0.8	0.3	40.0	100.0
Financial	49.9	17.4	13.2	10.6	4.5	2.8	0.9	0.5	0.1	100.0
Mission	58.6	19.9	10.5	7.4	2.4	0.8	0.3	0.1	0.0	100.0
North Beach	54.4	18.4	12.4	9.2	3.4	1.7	0.3	0.1	0.0	100.0
North Central	64.3	15.9	10.3	6.6	1.8	0.8	0.1	0.0	45.7	100.0
Northwest	65.7	17.2	9.9	5.0	1.2	0.7	0.2	0.0	0.1	100.0
South of Market	47.7	18.5	14.2	12.0	4.2	2.2	0.7	0.3	0.3	100.0
Southwest	65.2	17.0	9.4	5.7	1.7	0.8	0.1	0.0	7.6	100.0
Van Ness	62.9	15.8	10.4	7.0	2.3	1.3	0.2	0.0	5.7	100.0
Unclassified	105.4	1.0	0.7	0.5	0.2	0.1	0.0	0.0	0.0	100.0
TOTAL	71.6	12.3	8.4	6.2	2.2	1.2	0.3	0.1	0.1	100.0

Sources:

- California Employment Development Department, SF County Employment and payroll by land use categories
- Data not publicly available
- Additional calculations by the San Francisco Planning Department

5.0 MONETARY TRANSACTIONS

This chapter presents information about trends in monetary transactions that occur in San Francisco. While the 'Employment' and 'Establishments' chapters provide information regarding the quantity and growth of jobs and establishments in San Francisco, this chapter supplies complementary information regarding the city's economic prosperity in monetary terms. The chapter is divided into three sections, each relating to a key source of revenue in the city's economy such as retail sales and permits, annual wages, and government revenues.

Section 5.1 describes total annual wages received by individuals for work in San Francisco from 1997 to 2006, using data supplied by the California Employment Development Department (EDD). Section 5.2 presents the State Board of Equalization's data on San Francisco's taxable retail sales and sales tax permits in 2006. Section 5.3 reports city government revenues and expenditures in fiscal year 2006 (07/01/2005 – 06/30/2006). This data is obtained from the City Controller's office. The tables in each section report each indicator's quantity in specific units and annual percentage distribution.

Previous inventories from 1987-2000 also reported businesses' gross receipts by Commerce & Industry District. Since 2001, this data is no longer reported; as of May 25, 2001, the San Francisco Board of Supervisors repealed the gross receipts business tax.

Nominal or current dollars reported for a specified period of time have been adjusted for inflation to obtain constant dollars. The adjustments have been made to control for inflated monetary values, thus enabling better measurement of an indicator's economic performance over time. The adjustments have been made by dividing nominal or current values by the Consumer Price Index (CPI) provided by the United States Department of Labor, Bureau of Labor Statistics.

5.1 Wages by Land Use Category

This section describes total annual earnings received by persons for work in San Francisco from 1997 to 2006. Persons who received wages include workers who commute into the city and San Francisco residents employed in the city. The California Employment Development Department (EDD) prepares the measure of total annual wages. It includes each employee's total wages as reported by businesses in their payroll records. The earnings of sole proprietors are not reported in these data. Total annual wages are presented in millions of dollars, annual percentage distribution, and percentage change.

This section complements Chapter 3.0, Employment. The employment and wages data in this inventory are

derived from the same source, and are organized by Land Use Category. For an explanation of the Land Use Categories and C&I Districts, refer to Section 1.2 - Data Formats.

Since 2001, Land Use categories are organized according to North American Industry Classification system (NAICS). From 1997 through 2000, these were organized according to Standard Industrial Classification System (SIC). Both industry classification systems are discussed in Chapter 1 - Data Formats. Table 1.2 in Chapter 1 shows the closest match between SIC and NAICS land use categories. It is not possible to get a 100% match, because under the NAICS, certain industries have been moved from one Land Use Category to another.

- *Table 5.1.1 Total Annual Wages by Land Use Category, 1997-2006* — Total annual wages accelerated upwards in 2006, though it remained substantially lower than during the dot.com years after adjusting for inflation. This increase in annual wages was seen most acutely in Office (12%), though the wage gains in Hotel and CIE were also significant (6% and 4.6%, respectively).
- *Table 5.1.2 Annual Wages per Worker by Land Use Category, 1997-2006* — Average wage per worker also shows an acceleration of wages in 2006. All sectors, except for Retail workers, saw their wages rise, on average, 3.9%. Office workers by far earned the most, averaging \$107,870 annually in 2006, while Retail workers earned the least at an average of \$29,940.

5.2 Taxable Sales and Permits

Section 5.2 reports taxable sales in retail stores and the number of sales tax permits issued for retail stores located in San Francisco from 1999 to 2006. Taxable sales and permits in California are reported by the California State Board of Equalization (SBE). Taxable sales revenues and sales tax permits issued for outlets that are not retail stores, including business and personal services, have not been included. Such outlets include the following: non-store retailers (vending machines, sales by telephone), public utilities, government agencies, educational institutions, health services, and advertising agencies.

Taxable sales are measured by transactions subject to sales and use tax, and are reported by type of business for all cities and counties in California on a quarterly basis. Businesses are classified by the SBE according to their principal line of merchandise or service. Taxable sales are reported by type of business, but cannot be broken down by commodity. Those data do not include sales that are not subject to sales or use tax, such as food for home consumption, prescription medicine, sales for resale, and taxable sales disclosed by board audits.

The number of sales tax permits represents the number of businesses operated by all manufacturers, wholesalers, and retailers of tangible personal property, except those dealing in non-taxable commodities. Permits are tabulated semi-annually on January 1 and July 1.

- *Table 5.2.1 Taxable Retail Sales and All Outlet Sales, 1999-2006* — Taxable sales at Retail Stores and All Outlets continued the upward swing as sales recovered starting in 2003. Still, the level of activity recorded in 2000 remains to be achieved.
- *Table 5.2.2 Taxable Retail Sales & Sales Tax Permits by Type of Outlet, 2006* — The Other Retail Stores category accounts for 47% of the Retail Stores sales tax permits and 26% of retail taxable sales. Eating and Drinking establishments make up 25% of Retail Stores sales tax permits and retail taxable sales. Service Stations have the highest sales per establishment at just over \$4.4 million closely followed by General Merchandise stores which average \$4.2 million.

5.3 City Revenues and Expenditures

Section 5.3 presents San Francisco city government revenues and expenditures for fiscal year 2005-2006. The fiscal year ends on June 30th. The data in this subsection is from the Comprehensive Annual Financial Report, prepared by the San Francisco Controller's Office. This data concerns the general fund, special revenue funds, and debt service funds. Table 5.3.1 describes general governmental revenues by source. Table 5.3.2 describes general governmental expenditures by major function.

The general fund accounts for resources that are not required to be accounted for in other funds. Special revenue funds are used to account for the proceeds of a specific revenue source, other than expendable trusts or major capital projects, which are legally restricted to expenditures for specified purposes. Now included in the general fund are two major funds/activities that were previously accounted for in special revenue funds: hotel tax and work order funds. All other previous special revenue funds remain in the new fund structure as special revenue funds. The debt service funds account for the accumulation of property taxes and other revenue for periodic payment of interest and principal on general obligation and lease revenue bonds and related authorized costs. There are no changes in the fund structure of this fund type.

Other city funds not included are capital project funds, proprietary fund types, and fiduciary fund types. Proprietary funds consist of enterprise and internal service funds. Fiduciary funds consist of pension trust, non-expendable trust funds, and expendable trust funds.

Table 5.3.1 general governmental revenues are presented by major source while Table 5.3.2 presents them by government function for fiscal year 2005-06. Major revenue sources are property taxes; business taxes; other local taxes; licenses, fines and penalties; interest and investment income; rents and concessions; intergovernmental; and charges for services. The major functions of general governmental expenditures include public protection; public works, transportation, and commerce; human welfare and neighborhood development; community health; culture and recreation; general administration and finance; debt service; and capital outlay.

- *Table 5.3.1 San Francisco Government General Revenue by Source, Fiscal Year 2006* — Property Taxes and Intergovernmental transfers were the primary sources of revenue for San Francisco accounting for 33% and 31% respectively. Other significant sources of San Francisco government revenues were Other Local Taxes (18%) and Business Taxes (10%).
- *Table 5.3.2 San Francisco Government General Expenditures by Function, Fiscal Year 2006* — Public Protection, Human Welfare / Neighborhood Development, and Community Health functions were the largest recipients of San Francisco government expenditures in Fiscal Year 2006 accounting for 26%, 23%, and 16% respectively.

TABLE 5.1.1 TOTAL ANNUAL WAGES BY LAND USE CATEGORY, 1997-2006

This table contains the amount of wages paid to workers in each of the five major non-residential land use categories in San Francisco. Data is presented from 1997-2006, although the 2001 switch in classification systems from SIC to NAICS means that it is inappropriate to directly compare between 1997-2000 data and 2001-2006 data (see Chapter 1.2 - Data Formats for a description of land use categories and an SIC-NAICS discussion). Also included is the percentage distribution in any given year and the annual change within each land use category. The data is also presented graphically below in Figures 5.1.1 (a snapshot of job distribution in 2006) and 5.1.2 (a look at ten-year trends).

Nominal - Non-Adjusted for Inflation (\$ 000s)

Land Use Category	1997	1998	1999	2000	2001	2002	2003	2004	2005	2006
Office	\$12,439,000	\$14,468,000	\$17,567,000	\$20,739,473	\$21,199,248	\$18,033,855	\$17,219,114	\$17,619,077	\$19,229,061	\$22,250,471
Retail	\$1,919,158	\$2,169,000	\$2,581,000	\$3,114,529	\$2,799,088	\$2,658,388	\$2,650,198	\$2,664,799	\$2,841,746	\$2,942,479
Industrial	\$5,711,000	\$6,012,000	\$6,436,000	\$6,420,260	\$6,225,883	\$5,646,816	\$5,536,894	\$5,550,080	\$5,550,920	\$5,753,421
Hotel	\$472,415	\$514,000	\$536,000	\$557,887	\$500,105	\$500,105	\$538,418	\$584,876	\$613,242	\$671,000
CIE	\$4,267,000	\$4,145,000	\$4,248,000	\$4,310,301	\$5,094,812	\$5,177,070	\$5,403,197	\$5,558,781	\$5,911,782	\$6,380,066
TOTAL	\$24,810,885	\$27,309,550	\$31,369,029	\$35,143,450	\$35,880,136	\$32,019,082	\$31,347,821	\$31,977,613	\$34,149,206	\$37,998,504

Inflation-Adjusted (2006 \$ 000s)

Land Use Category	1997	1998	1999	2000	2001	2002	2003	2004	2005	2006
Office	\$16,223,434	\$18,288,251	\$21,304,443	\$24,077,124	\$23,353,779	\$19,547,578	\$18,341,337	\$18,540,799	\$19,845,681	\$22,250,471
Retail	\$2,503,042	\$2,741,721	\$3,130,117	\$3,615,758	\$3,083,566	\$2,881,527	\$2,822,920	\$2,804,205	\$2,932,873	\$2,942,479
Industrial	\$7,448,511	\$7,599,459	\$7,805,282	\$7,453,487	\$6,858,634	\$6,119,713	\$5,897,751	\$5,840,427	\$5,728,922	\$5,753,421
Hotel	\$616,142	\$649,721	\$650,036	\$647,669	\$594,518	\$542,083	\$573,508	\$615,473	\$632,907	\$671,000
CIE	\$5,565,190	\$5,239,480	\$5,151,777	\$5,003,967	\$5,612,611	\$5,611,622	\$5,755,340	\$5,849,582	\$6,101,356	\$6,380,066
TOTAL	\$32,369,768	\$34,520,591	\$38,042,903	\$40,799,166	\$39,526,722	\$34,706,694	\$33,390,856	\$33,650,487	\$35,244,272	\$37,998,504

Annual Percentage Distribution

Land Use Category	1997	1998	1999	2000	2001	2002	2003	2004	2005	2006
Office	50.1	53.0	56.0	59.0	59.1	56.3	54.9	55.1	56.3	58.6
Retail	7.7	7.9	9.2	8.9	7.8	8.3	8.5	8.3	8.3	7.7
Industrial	23.0	22.0	20.5	18.3	17.4	17.6	17.7	17.4	16.3	15.1
Hotel	1.9	1.9	1.7	1.6	1.5	1.6	1.7	1.8	1.8	1.8
CIE	17.2	15.2	13.5	12.3	14.2	16.2	17.2	17.4	17.3	16.8
TOTAL	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0

Percentage Change

Land Use Category	1997-98	1998-99	1999-00	2000-01	2001-02	2002-03	2003-04	2004-05	2005-06
Office	12.7	16.5	13.0	N/A	-16.3	-6.2	1.1	7.0	12.1
Retail	9.5	14.2	15.5	N/A	-6.6	-2.0	-0.7	4.6	0.3
Industrial	2.0	2.7	-4.5	N/A	-10.8	-3.6	-1.0	-1.9	0.4
Hotel	5.4	0.0	-0.4	N/A	-8.8	5.8	7.3	2.8	6.0
CIE	-5.9	-1.7	-2.9	N/A	-0.0	2.6	1.6	4.3	4.6
TOTAL	6.7	10.2	7.3	N/A	-12.2	-3.8	0.8	4.7	7.8

Note:

- CIE = Cultural/Institutional/Educational
- Data through 2000 data based on SIC; 2001 and subsequent years are based on NAICS.
- N/A = Not Applicable, due to change in classification methodologies. See Chapter 1 for an explanation.
- CPI-U for the San Francisco-Oakland-San Jose Metropolitan Statistical Area from the US Bureau of Labor Statistics

Sources:

- California Employment Development Department, SF County Employment and payroll by land use categories
- Data not publicly available
- Additional calculations by the San Francisco Planning Department

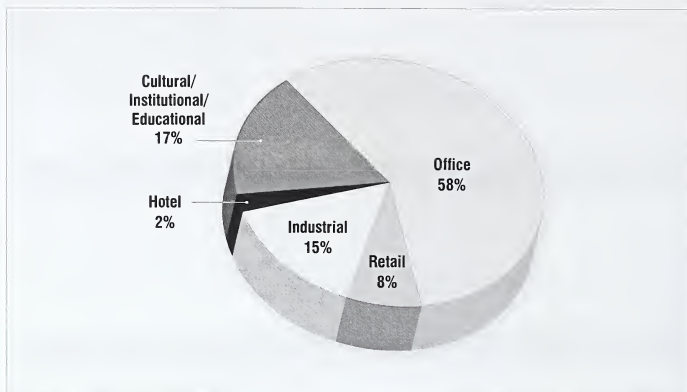
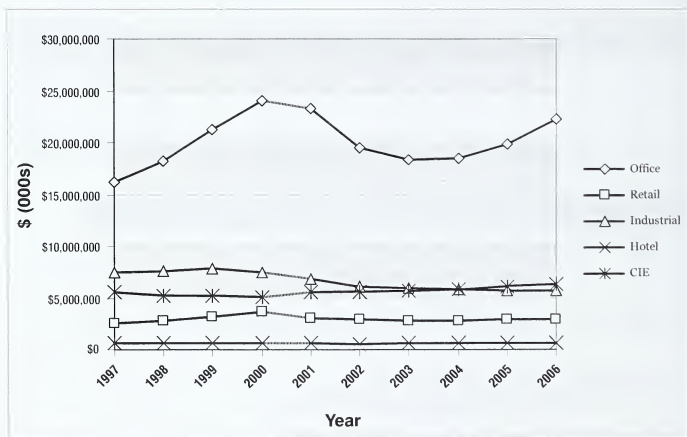
FIGURE 5.1.1 TOTAL ANNUAL WAGES BY LAND USE CATEGORY, 2006**FIGURE 5.1.2** TOTAL ANNUAL WAGES BY LAND USE CATEGORY, 1997-2006

TABLE 5.1.2 ANNUAL WAGES PER WORKER BY LAND USE CATEGORY, 1997-2006

This table conveys the change in pay per worker. It is based on the wages (Table 5.1.1) and employment data (Table 3.1) previously presented in this document. This information is shown graphically in Figure 5.1.3.

Wages per Worker (2006 \$)

Land Use Category	1997	1998	1999	2000	2001	2002	2003	2004	2005	2006
Office	\$76,969	\$82,785	\$92,917	\$98,965	\$98,556	\$91,424	\$91,028	\$95,977	\$101,502	\$107,870
Retail	\$28,110	\$29,099	\$32,216	\$34,932	\$30,378	\$29,842	\$29,529	\$29,516	\$30,540	\$29,935
Industrial	\$62,663	\$62,826	\$66,378	\$63,956	\$63,602	\$62,535	\$62,925	\$65,596	\$67,643	\$70,422
Hotel	\$32,569	\$33,322	\$33,298	\$34,337	\$33,099	\$32,899	\$32,888	\$34,023	\$34,352	\$35,155
CIE	\$46,545	\$43,472	\$40,371	\$39,693	\$45,921	\$45,901	\$46,086	\$45,713	\$47,398	\$48,835
TOTAL	\$58,096	\$59,919	\$64,352	\$67,075	\$67,396	\$63,453	\$62,631	\$64,307	\$67,338	\$70,893

Sources:

- Employees from Table 3.1 of this report
- Wages from Table 5.1.1 of this report

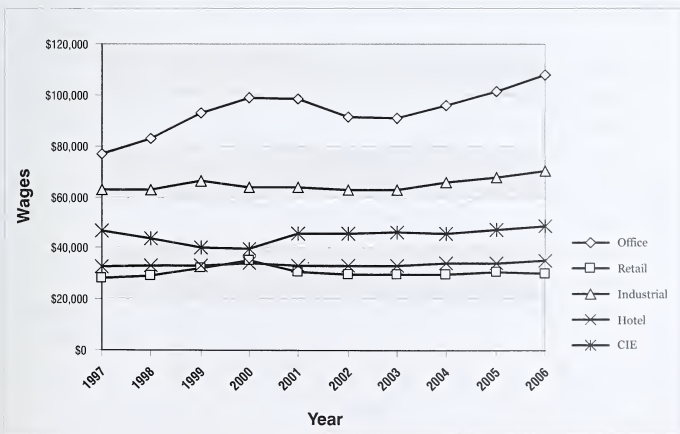
FIGURE 5.1.3 ANNUAL WAGES PER WORKER BY LAND USE CATEGORY, 1997-2006

TABLE 5.2.1 TAXABLE RETAIL SALES AND ALL OUTLET SALES, 1999-2006

This table conveys taxable sales in San Francisco from 1999-2006. The first table shows the amount of dollars as recorded each year, and the second shows this amount adjusted to reflect inflation. This information is presented graphically in Figure 5.2.1.

Nominal - Non-Adjusted for Inflation (\$ 000s)

Type of Sales	1999	2000	2001	2002	2003	2004	2005	2006
All Retail Sales	\$7,678,089	\$8,750,456	\$7,990,386	\$7,641,958	\$7,767,688	\$8,414,781	\$9,049,788	\$9,588,520
All Outlets	\$12,338,760	\$14,089,926	\$12,455,236	\$11,589,440	\$11,496,746	\$12,207,507	\$13,025,974	\$13,892,188

Inflation-Adjusted (2006 \$ 000s)

Type of Sales	1999	2000	2001	2002	2003	2004	2005	2006
All Retail Sales	\$9,311,630	\$10,158,687	\$8,802,468	\$8,283,407	\$8,272,867	\$8,854,991	\$9,339,988	\$9,588,520
All Outlets	\$14,963,876	\$16,357,450	\$13,721,092	\$12,562,232	\$12,246,025	\$12,846,129	\$13,443,679	\$13,892,188

Sources:

- California State Board of Equalization, Taxable Sales in California
- <http://www.boe.ca.gov/news/salescont06.htm>
- CPI-U for the San Francisco-Oakland-San Jose Metropolitan Statistical Area from the US Bureau of Labor Statistics
- Additional calculations by the San Francisco Planning Department

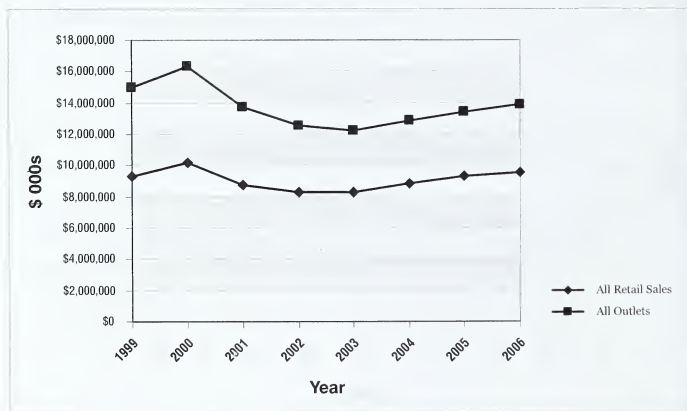
FIGURE 5.2.1 TAXABLE RETAIL SALES AND ALL OUTLET SALES, 1999-2006

TABLE 5.2.2 TAXABLE RETAIL SALES & SALES TAX PERMITS BY TYPE OF OUTLET, 2006

This table looks more closely at the type of retail sales that occurred in 2006, as well as the number of sales permits issued in that time.

Type of Retail Sales	Sales Tax Permits	Taxable Sales Transactions (\$ 000s)
Apparel Stores	1,385	\$941,299
General Merchandise	303	\$1,280,908
Food Stores	1,065	\$454,970
Eating & Drinking	3,923	\$2,367,548
Home Furnishings & Appliances	1,191	\$598,279
Building Materials and Farm Implements	243	\$428,795
Service Stations	120	\$530,183
Automotive Dealers and Supplies	225	\$501,603
Other Retail Stores	7,544	\$2,484,935
Total Retail Stores	15,999	\$9,588,520
Total Outlets	28,968	\$13,892,188

Note:

- Other Retail Stores include:
 - Packaged liquor stores
 - Second hand merchandise
 - Farm and garden supply stores;
 - Fuel and ice dealers;
 - Mobile homes, trailers, and campers
 - Boat, motorcycle, and plane dealers
 - Specialty store group.
- In other derivations of BOE data all their retail stores includes farm implements.

Sources:

- California State Board of Equalization, Taxable Sales in California
- <http://www.boe.ca.gov/news/salescon06.htm>
- CPI-U for the San Francisco-Oakland-San Jose Metropolitan Statistical Area from the US Bureau of Labor Statistics
- Additional calculations by the San Francisco Planning Department

TABLE 5.3.1 SAN FRANCISCO GOVERNMENT GENERAL REVENUES BY SOURCE, FISCAL YEAR 2006

Table 5.3.1 conveys the expenditures by the City and County of San Francisco in Fiscal Year 2006. This data is shown graphically in Figure 5.3.2.

Revenue Source	Amount (\$ 000s)	Percentage Distribution
Property Taxes	\$1,008,151	30.0
Business Taxes	\$323,153	9.6
Other Local Taxes	\$595,664	17.7
Licenses, Fines, Penalties	\$42,111	1.3
Interest and Investment Income	\$70,046	2.1
Rents and Concessions	\$52,426	1.6
Intergovernmental	\$940,474	28.0
- Federal	\$350,985	10.5
- State	\$565,989	16.9
- Other	\$23,500	0.7
Charges for Services	\$263,994	7.9
Other	\$61,565	1.8
TOTAL	\$3,357,584	100.0

Note:

- Fiscal Year 2006 runs from July 1 2005 to June 30 2006

Source:

- San Francisco Controller, Comprehensive Annual Financial Report.
- <http://www.sfgov.org/site/uploads/files/controller/reports/CAFR/06/BasicFinancialStatements.pdf>

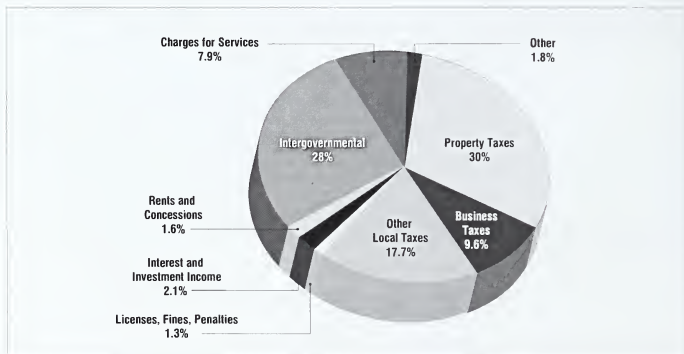
FIGURE 5.3.1 SAN FRANCISCO GOVERNMENT GENERAL REVENUES BY SOURCE, FISCAL YEAR 2006

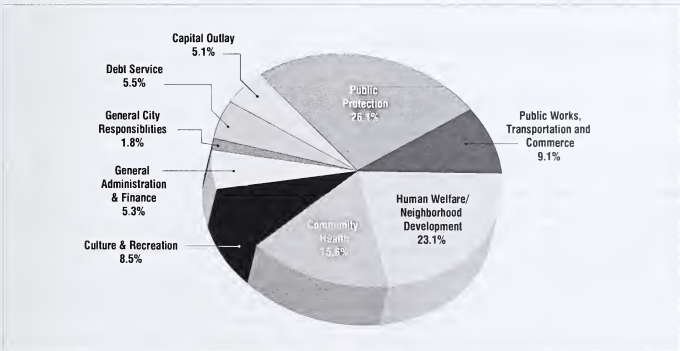
TABLE 5.3.2 SAN FRANCISCO GOVERNMENT GENERAL EXPENDITURES BY FUNCTION, FISCAL YEAR 2006

Table 5.3.1 conveys the revenues for the City and County of San Francisco in Fiscal Year 2006. This data is shown graphically in Figure 5.3.1.

Expenditure Function	Amount (\$ 000s)	Percentage Distribution
Public Protection	\$787,398	26.1
Public Works, Transportation and Commerce	\$274,669	9.1
Human Welfare/Neighborhood Development	\$697,102	23.1
Community Health	\$471,741	15.6
Culture & Recreation	\$256,979	8.5
General Admin & Finance	\$161,195	5.3
General City Responsibilities	\$53,763	1.8
Debt Service	\$164,878	5.5
Capital Outlay	\$153,493	5.1
TOTAL	\$3,021,218	100.0

Note:
• Fiscal Year 2006 runs from July 1, 2005 to June 30, 2006

Source:
• San Francisco Controller, Comprehensive Annual Financial Report.
• <http://www.sfgov.org/site/uploadedfiles/controller/reports/CAFR/06/BasicFinancialStatements.pdf>

FIGURE 5.3.2 SAN FRANCISCO GOVERNMENT GENERAL EXPENDITURES BY FUNCTION, FISCAL YEAR 2006

6.0 BUILDING AND LAND USE

The tables and graphs in this chapter present information about building permit applications for 1997 through 2006, as well as land use data for 2006. Building permit applications are filed at the City and County of San Francisco Department of Building Inspection (DBI) for construction of new buildings, demolitions, and alterations to existing structures. The number of permits, status of applications, and cost of projects are measures of construction activity in San Francisco. All information for this section was provided by DBI and has been reviewed and tabulated by Planning Department staff.

6.1 Building

The discussion of building in San Francisco is presented in five sections.

Sections 6.1 and 6.2. Data are reported by the year that a project was filed with the Department of Building Inspection. In past Commerce & Industry Inventories, these tables were presented by Certificate of Final Completion, a later stage in the permit process. Certificates of Final Completion have proven difficult to track accurately. All applications filed may not ultimately lead to completed projects, but trends in the number of building permit applications filed are an important economic indicator. In Section 6.1, data are reported by Land Use Category; in Section 6.2, these data are reported by Commerce and Industry (C&I) District. For further information on Land Use Categories and C&I Districts, refer to

the Data Formats section in the Chapter 1. Tables in these sections are subdivided into three groups: all building permits, building permits for new construction activity, and building permits for alterations and demolitions. In turn, each group contains tables that report information on permits, total construction cost, and average construction cost by year, land use and C&I District. Annual percentage distributions and annual percentage changes are reported for numbers of permit applications and total construction costs. Construction cost values are adjusted for inflation using Saylor Inc.'s "Materials/Labor Cost Index for Construction," where 1983 is designated as the base year.

- *Table 6.1.1.A All Building Permits by Land Use Category, 1997-2006* — The number of building permits increased again in 2006 after a slowdown in 2005. The normal annual fluctuation of permit application by land use category continued, with only Office and Other categories showing decreases.
- *Table 6.1.1.B Total Construction Costs for All Building Permits by Land Use Category, 1997-2006* — Total construction costs decreased almost 8% after two years of increases, with the largest drop occurring in the Residential category.
- *Table 6.1.1.C Average Construction Costs for All Building Permits by Land Use Category, 1997-2006* — Average construction costs went down in 2006. However, this decline is not an indication

of a downward trend because of the varied and random nature of the permit application process. For example, in a given year, a few very expensive projects can skew the entire total.

- *Table 6.1.2.A Building Permits for New Construction by Land Use Category, 1997-2006* — The number of building permits for new construction decreased almost 20% in 2006. The biggest category decline was for Residential permits. However, the number of new construction projects in the Industrial and CIE categories increased substantially.
- *Table 6.1.2.B Total Construction Costs for New Construction by Land Use Category, 1997-2006* — Total new construction costs decreased substantially in 2006, almost entirely driven by a decrease in residential construction.
- *Table 6.1.2.C Average Construction Costs for New Construction by Land Use Category, 1997-2006* — Average new construction costs fell slightly in 2006. As stated earlier, it is difficult to discern a trend given the varied nature of the permitting process.
- *Table 6.1.3.A Building Permits for Alteration and Demolition by Land Use Category, 1997-2006* — The number of permits for alterations and demolitions has remained largely constant for a number of years. The number of overall alteration and demolition permits rose slightly (2.3% increase).
- *Table 6.1.3.B Total Construction Costs for Alterations and Demolitions by Land Use Category, 1997-2006* — Total construction costs for alterations and demolitions rose 7.5% in 2006 after remaining fairly constant since 2002. The largest fluctuations in 2006 occurred within the Retail, Hotel, and CIE land use categories.
- *Table 6.1.3.C Average Construction Costs for Alterations and Demolitions by Land Use Category, 1997-2006* — Average construction cost for demolition and alteration has remained relatively stable for the past six years, with some fluctuation by land use category.

- *Table 6.2.1.A All Building Permits by Commerce & Industry District, 1997-2006* — There was little change in the distribution of permits by district over the past three years. An increase in the South of Market district more than offset losses in the Financial and Civic Center districts. The Southwest district is by far the most active C&I district for permit activity, consistently accounting for at least a third of all permits.
- *Table 6.2.1.B Total Construction Costs for All Building Permits by Commerce & Industry District, 1997-2006* — Overall construction costs declined by 7.9% from 2005 to 2006. While the Financial and South of Market districts continued to have the highest percentage distribution of the costs, the districts also showed the largest year-to-year declines from 2005 to 2006.
- *Table 6.2.1.C Average Construction Costs for All Building Permits by Commerce & Industry District, 1997-2006* — Average construction cost fluctuated greatly in the past year, which is not atypical. Given that there was fluctuation by both land use category and district, it is difficult to assess any patterns. Citywide, the average permit cost was lower in 2006 by 9.6%.
- *Table 6.2.2.A Building Permits for New Construction by Commerce & Industry District, 1997-2006* — Overall, permits for new construction decreased by 19% between 2005 and 2006. There was some fluctuation in the number of permits issued for new construction by district, including significant decreases in the North Central and Van Ness districts, while the Northwest district showed a modest increase in new construction permits.
- *Table 6.2.2.B Total Construction Costs for New Construction by Commerce & Industry District, 1997-2006* — There was substantial changes by district in the cost for new construction between 2005 and 2006, as almost every district posted double-digit changes. This is not atypical of new construction costs. Overall new construction costs declined by 22.7% from 2005 to 2006.

- *Table 6.2.2.C Average Construction Costs for New Construction by Commerce & Industry District, 1997-2006* — Given the fluctuations in total construction cost, the fluctuation in average cost is to be expected. Citywide, the average cost of permits for new construction decreased by 4.6% between 2005 and 2006.
- *Table 6.2.3.A Building Permits for Alterations and Demolitions by Commerce & Industry District, 1997-2006* — Citywide, permits for alterations and demolitions rose by 2.3%. Percentage wise, the number of permits for alterations or demolitions was largely consistent with previous years by district, with the largest increases occurring in the South of Market and Van Ness districts and the largest negative turnaround in the Financial district.
- *Table 6.2.3.B Total Construction Costs for Alterations and Demolitions by Commerce & Industry District, 1997-2006* — Costs for alterations and demolitions varied substantially from previous years for most districts, which is not unusual.
- *Table 6.2.3.C Average Construction Costs for Alterations and Demolitions by Commerce & Industry District, 1997-2006* — Like total costs, average costs also fluctuated from 2005 to 2006 for most districts, but to a lesser degree.

Section 6.3. Permit and construction cost data are cross-tabulated by Land Use Category and C&I District. This section includes all permit applications filed in 2006.

- *Table 6.3.A Permit Applications by Commerce & Industry District and Land Use Category, 2006* — The Residential land use category is by far the largest generator of building permits accounting for 71.7% of all permits in 2006. The Southwest district generated 44.4% of the residential permits. Two-thirds of all office permits were located in the Financial district. Retail permit activity was highest in the South of Market district (35.7%). Industrial permit applications tended to be in the South of Market (38.8%) and

Bayview (27.1%) districts. CIE and Hotel permits tended to be more widely distributed among the C&I districts.

- *Table 6.3.B Total Construction Costs of All Permits by Commerce & Industry District and Land Use Category, 2006* — Construction costs for office permits were greatest in the Financial (44.3%) and South of Market (33.2%) districts. The North Central, Southwest, South of Market, and Financial districts accounted for the highest percentage of residential construction costs accounting for 23%, 17.5%, 16.7%, and 16.6% respectively. The majority of retail construction spending occurred in the South of Market district (51.5%). CIE permit costs were concentrated in the North Central district (36.6%), while hotel permit spending was highest in the Van Ness district (43.6%).
- *Table 6.3.C Average Construction Costs of All Permits by Commerce & Industry District and Land Use Category, 2006* — Average construction costs were highest for Hotel and CIE permits at \$357,700 and \$295,700 respectively. Among the districts, average construction costs were highest for the Van Ness (\$494,200) and North Central (\$339,000) districts.

Section 6.4 describes permit applications by application status by Land Use Category and then by C&I District for 2006. These permit status categories are grouped into the following four major categories: building permit applications which were approved for construction, whether or not a permit has been issued; building permit applications which were canceled, including applications which have been withdrawn, revoked or disapproved; building permit applications where the authorized work has been completed; and 'other,' which includes applications which have not yet been acted upon, have been abandoned, reinstated, appealed, or for which no information is available.

- *Table 6.4.1.A Building Permits by Land Use Category and Permit Status, 2006* — Almost all Building permits were concentrated in either

the Completed (57.4%) or Issued (39.1%) permit status category. Residential permits accounted for more than 70% of the permits in both the Completed and Issued categories and in total permits.

- *Table 6.4.1.B Total Construction Costs of All Building Permits by Land Use Category and Permit Status, 2006* — More than 99% of all construction costs were in the Issued (46.3%), Other (27%), or Completed (26%) permit status. Almost half (49.3%) of Issued construction costs and 82.4% of Other construction costs were in the Residential land use category in 2006 indicating that a great deal of housing development was both under construction and in the pipeline at that time.
- *Table 6.4.1.C Average Construction Costs of All Permits by Land Use Category and Permit Status, 2006* — Generally, the average construction cost for permits in the “Other” category were considerably higher than those in other categories. This disparity may be the result of the increased costs of building materials (concrete, lumber, steel, etc.) associated with those permits filed more recently and still under review. The most expensive average construction cost was for CIE projects in the Other category where the average cost topped \$1,284,000.
- *Table 6.4.2.A Building Permits by Commerce & Industry District and Permit Status, 2006* — About a third of both Completed and Issued permits were in the Southwest district. The North Central district had the next highest percentage of permits that were Completed (14.3%) and Issued (14%).
- *Table 6.4.2.B Total Construction Costs by Commerce & Industry District and Permit Status, 2006* — The Financial district had the highest share of total construction costs for completed projects (27.9%) followed by South of Market (19.5%) and Southwest (17.4%). Issued permit construction costs were highest in the South of Market district (35.1%). Construction costs for projects in the

Other category were concentrated in the North Central (33.4%) and Financial (32.5%) districts.

- *Table 6.4.2.C Average Construction Costs by Commerce & Industry District and Permit Status, 2006* — Average construction costs for Issued permits generally tended to be higher than Completed projects, and projects in the Other category were higher still than those in the Issued category. Once again, the rising cost of construction materials and other components associated with construction may be behind these disparities. Of particular note are the very high average construction costs for projects in the Other category for both the Financial and North Central districts indicating that there may be some very large projects currently in the pipeline.

The construction cost data reported in these tables are the estimated construction cost for each project, as reported by DBI. Total and average construction cost measure the scope, complexity, and extent of construction activity in San Francisco. While total construction cost indicates the size and complexity of construction activity in San Francisco for a particular year, average construction cost relates number of applications to total construction cost, allowing for consideration of construction cost per building permit application. Construction cost values are adjusted for inflation using Saylor Inc.’s “Materials/Labor Cost Index for Construction,” where 1983 is designated as the base year (1983=100).

Section 6.5 reports total office space in San Francisco from 1997 to 2006. It includes absolute numbers as well as percentage changes over time. These data do not come from DBI, but rather from Cushman-Wakefield realtors.

- *Table 6.5 Total Existing Office Space in Central and Non-Central Business Districts, 1997-2006* — Total office space increased by half a percent from 2005 citywide and in the Central Business District and slightly less outside the Central Business District.

6.2 Land Use

Section 6.6 reports land use activity in San Francisco. Land use, for this section, is determined by incorporating both the business type on the parcel and the location of that parcel. Business data are culled from the Dun & Bradstreet databases. Dun & Bradstreet is a firm that conducts national surveys of existing businesses, gathering information which includes number of employees, square footage of businesses, and an industry classification system which best classifies those businesses. A parcel has to have 80% or more of its usable building space occupied by one specific land use in order to warrant that particular land use classification. Less than 80% in any one land use results in a Mixed Uses designation. If either the Planning Department or the Department of Building Inspection has a record of a residence on a lot, it is determined to be of a Residential land use. If a lot contains a residence and a business establishment, that lot is classified as Mixed Residential.

Land Use is also determined by the location of a given parcel. The impact of location on land use classification is illustrated by the following example. If an establishment with a NAICS (North American Industry Classification System) code of 236 (Construction) is in the Financial District, it will be classified as Office use. If an establishment with the same NAICS code is located in South of Market or Bayview districts, it will be classified as Industrial. Construction is generally considered part of the Industrial land use classification. In the above scenario, however, the Financial District location of a construction business indicates that the business is conducting management, information, or professional services in more of an office setting and should therefore be assigned an Office land use classification.

The NAICS code for land uses under Office, Retail, Industrial, Hotel, and Cultural/Institutional/Educational (CIE) land use categories are noted in Table 1.2, Chapter 1. The Residential land use category data are gathered from Housing Inventory and Building Inspection's Permit Tracking System. Vacant sites data are gathered from information supplied by the Assessor's Office. Table 6.6 provides details on the amount of square footage for each land use, as a predominant use on each parcel of land, in 21 distinct plan areas in San Francisco. Map 6.6 shows the location of the plan areas. Table 6.6 is based on the information available in year 2006.

- *Table 6.6 Land Use Square Footage by Plan Area, 2006* – Residential is the largest single land use category accounting for 41.4% of land area in San Francisco followed by public land and open space with 25.9%.

Of the 21 plan areas, most of the land area (62.6%) can be found in the Rest of the City area. Otherwise, only the Bayview (7.5%) and the Presidio (6.7%) constitute sizable portions of land area.

The Bayview plan area has the most Industrial (28.2%) and Vacant (35%) land in the city. Other plan areas with significant industrial land were the Central Waterfront (25%) and the Port (27%).

TABLE 6.1.1.A ALL BUILDING PERMITS BY LAND USE CATEGORY, 1997-2006

This table presents the number of building permits filed by land use category from 1996-2005 (see Chapter 1.2 – Data Formats for a definition of land use categories). All building permits include new construction, alteration, and demolitions. Also included is the percentage distribution in any given year and the annual change within each land use category.

Number of Permits

Land Use Category	1997	1998	1999	2000	2001	2002	2003	2004	2005	2006	TOTAL
Office	3,526	3,825	4,130	5,344	4,195	3,181	3,581	3,813	4,202	4,133	39,930
Retail	1,975	2,119	2,136	1,790	1,787	1,745	1,753	1,887	1,661	2,139	18,992
Industrial	271	224	284	345	315	239	211	176	185	170	2,420
Hotel	151	173	172	248	191	184	196	183	144	193	1,835
CIE	547	532	553	419	452	512	432	364	356	429	4,596
Residential	18,113	18,128	18,416	18,072	17,388	19,426	19,712	19,930	19,508	19,653	188,346
Other	726	828	883	1,213	933	625	766	724	779	689	8,166
TOTAL	25,309	25,829	26,574	27,431	25,261	25,912	26,651	27,077	26,835	27,406	264,285

Annual Percentage Distribution

Land Use Category	1997	1998	1999	2000	2001	2002	2003	2004	2005	2006	Average
Office	13.9	14.8	15.5	19.5	16.6	12.3	13.4	14.1	15.7	15.1	15.1
Retail	7.8	8.2	8.0	6.5	7.1	6.7	6.6	7.0	6.2	7.8	7.2
Industrial	1.1	0.9	1.1	1.3	1.2	0.9	0.8	0.6	0.7	0.6	0.9
Hotel	0.6	0.7	0.6	0.9	0.8	0.7	0.7	0.7	0.5	0.7	0.7
CIE	2.2	2.1	2.1	1.5	1.8	2.0	1.6	1.3	1.3	1.6	1.7
Residential	71.6	70.2	69.3	65.9	68.8	75.0	74.0	73.6	72.7	71.7	71.3
Other	2.9	3.2	3.3	4.4	3.7	2.4	2.9	2.7	2.9	2.5	3.1
TOTAL	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0

Percentage Change

Land Use Category	1997-98	1998-99	1999-00	2000-01	2001-02	2002-03	2003-04	2004-05	2005-06	Average
Office	8.5	8.0	29.4	-21.5	-24.2	12.6	6.5	10.2	-1.6	3.1
Retail	7.3	0.8	-16.2	-0.2	-2.4	0.5	7.6	-12.0	28.8	1.6
Industrial	-17.3	26.8	21.5	-8.7	-24.1	-11.7	-16.6	5.1	-8.1	-3.7
Hotel	14.6	-0.6	44.2	-23.0	-3.7	6.5	-6.6	-21.3	34.0	4.9
CIE	-2.7	3.9	-24.2	7.9	13.3	-15.6	-15.7	-2.2	20.5	-1.7
Residential	0.1	1.6	-1.9	-3.8	11.7	1.5	1.1	-2.1	0.7	1.0
Other	14.0	6.6	37.4	-23.1	-33.0	22.6	-5.5	7.6	-11.6	1.7
TOTAL	2.1	2.9	3.2	-7.9	2.6	2.9	1.6	-0.9	2.1	0.9

Note:
• CIE = Cultural/Institutional/Educational

Sources:
• San Francisco Planning Department
• Department of Building Inspection

TABLE 6.1.1.B TOTAL CONSTRUCTION COSTS FOR ALL BUILDING PERMITS BY LAND USE CATEGORY, 1997-2006

This table presents the total cost of construction associated with building permits filed by land use category from 1997-2006. For consistency with previous C&I reports, costs are adjusted for inflation, with 1983 being the base year. Also included is the percentage distribution in any given year and the annual change within each land use category.

Total Construction Costs (Inflation-Adjusted 1983 \$ 000s)

Land Use Category	1997	1998	1999	2000	2001	2002	2003	2004	2005	2006
Office	\$180,396	\$943,559	\$330,270	\$827,426	\$233,256	\$179,323	\$156,504	\$186,497	\$210,249	\$317,964
Retail	\$69,133	\$103,408	\$323,704	\$236,699	\$76,120	\$66,935	\$85,382	\$56,203	\$49,522	\$75,189
Industrial	\$21,390	\$15,245	\$25,733	\$74,319	\$29,060	\$18,942	\$9,708	\$12,622	\$7,951	\$8,804
Hotel	\$15,712	\$77,874	\$25,769	\$124,006	\$21,231	\$86,498	\$4,399	\$2,770	\$16,249	\$33,284
CIE	\$52,181	\$73,131	\$47,694	\$130,103	\$135,717	\$63,152	\$67,649	\$120,892	\$32,409	\$61,103
Residential	\$408,639	\$574,789	\$515,561	\$515,867	\$510,984	\$628,357	\$488,554	\$620,579	\$901,855	\$611,374
Other	\$9,389	\$5,711	\$6,578	\$14,637	\$12,429	\$3,129	\$3,398	\$8,174	\$4,382	\$17,878
TOTAL	\$776,841	\$1,793,717	\$1,275,310	\$1,923,057	\$1,018,798	\$1,046,337	\$815,595	\$1,007,737	\$1,222,617	\$1,125,597

Annual Percentage Distribution

Land Use Category	1997	1998	1999	2000	2001	2002	2003	2004	2005	2006
Office	23.2	52.6	25.9	43.0	22.9	17.1	19.2	18.5	17.2	28.2
Retail	11.5	5.8	25.4	12.3	7.5	6.4	10.5	5.6	4.1	6.7
Industrial	2.8	0.8	2.0	3.9	2.9	1.8	1.2	1.3	0.7	0.8
Hotel	6.7	4.1	3.7	6.8	13.3	6.0	8.3	12.0	2.7	3.0
CIE	2.0	4.3	2.0	6.4	2.1	8.3	0.5	0.3	1.3	5.4
Residential	52.6	32.0	40.4	26.8	50.2	60.1	59.9	61.6	73.8	54.3
Other	1.2	0.3	0.5	0.8	1.2	0.3	0.4	0.8	0.4	1.6
TOTAL	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0

Percentage Change

Land Use Category	1997-98	1998-99	1999-00	2000-01	2001-02	2002-03	2003-04	2004-05	2005-06	Average
Office	423.0	-65.0	150.5	-71.8	-23.1	-12.7	19.2	12.7	51.2	53.8
Retail	16.0	213.0	-26.9	-67.8	-12.1	27.6	-34.2	-11.9	51.8	17.3
Industrial	-28.7	68.8	188.8	-60.9	-34.8	-48.7	30.0	-37.0	10.7	9.8
Hotel	40.1	-34.8	172.8	4.3	-53.5	7.1	78.7	-73.2	2.7	16.0
CIE	395.6	-66.9	381.2	-82.9	307.4	-94.9	-37.0	486.5	276.0	173.9
Residential	40.7	-10.3	0.1	-0.9	23.0	-22.2	27.0	45.3	-32.2	7.8
Other	-39.2	15.2	122.5	-15.1	-74.8	8.6	140.6	-46.4	308.0	46.6
TOTAL	130.9	-28.9	50.8	-47.0	2.7	-22.1	23.6	21.3	-7.9	13.7

Note:

• CIE = Cultural/Institutional/Educational

Sources:

• San Francisco Planning Department
• Department of Building Inspection

TABLE 6.1.1.C AVERAGE CONSTRUCTION COSTS FOR ALL BUILDING PERMITS BY LAND USE CATEGORY, 1997-2006

This table presents the average construction cost for all building permits filed by land use category. It represents the total costs (Table 6.1.1.A) divided by the total permits (Table 6.1.1.B).

Average Construction Costs (Inflation-Adjusted 1983 \$ 000s)

Land Use Category	1997	1998	1999	2000	2001	2002	2003	2004	2005	2006	Average
Office	\$51.2	\$246.7	\$80.0	\$154.8	\$55.6	\$56.4	\$43.7	\$48.9	\$50.0	\$76.9	\$86.4
Retail	\$45.1	\$48.8	\$151.5	\$132.2	\$42.6	\$38.4	\$48.7	\$29.8	\$29.8	\$35.2	\$60.2
Industrial	\$78.9	\$68.1	\$90.6	\$215.4	\$92.3	\$79.3	\$46.0	\$71.7	\$43.0	\$51.8	\$83.7
Hotel	\$104.1	\$450.1	\$149.8	\$500.0	\$111.2	\$470.1	\$22.4	\$15.1	\$112.8	\$172.5	\$210.8
CIE	\$95.4	\$137.5	\$86.2	\$310.5	\$300.3	\$123.3	\$156.6	\$332.1	\$91.0	\$142.4	\$177.5
Residential	\$22.6	\$31.7	\$28.0	\$28.5	\$29.4	\$32.3	\$24.8	\$31.1	\$46.2	\$31.1	\$30.6
Other	\$12.9	\$6.9	\$7.5	\$12.1	\$13.3	\$5.0	\$4.4	\$11.3	\$5.6	\$25.9	\$10.5
TOTAL	\$30.7	\$69.4	\$48.0	\$70.1	\$40.3	\$40.4	\$30.6	\$37.2	\$45.6	\$41.1	\$45.3

Note:

- CIE = Cultural/Institutional/Educational

Sources:

- San Francisco Planning Department
- Department of Building Inspection

TABLE 6.1.2.A BUILDING PERMITS FOR NEW CONSTRUCTION BY LAND USE CATEGORY, 1997-2006

This table presents the number of building permits filed for new construction by land use category from 1997 - 2006. Also included is the percentage distribution in any given year and the annual change within each land use category.

Number of Permits

Land Use Category	1997	1998	1999	2000	2001	2002	2003	2004	2005	2006	TOTAL
Office	2	8	9	36	5	8	4	2	6	5	85
Retail	28	23	28	25	28	23	16	16	10	10	207
Industrial	5	17	15	13	10	8	5	7	4	13	97
Hotel	0	2	1	2	1	2	0	0	0	1	9
CIE	21	12	9	8	17	6	11	9	5	18	116
Residential	300	384	422	343	250	216	252	189	260	179	2,795
Other	0	1	1	4	2	2	0	2	0	4	16
TOTAL	356	447	485	431	313	265	288	225	285	230	3,325

Annual Percentage Distribution

Land Use Category	1997	1998	1999	2000	2001	2002	2003	2004	2005	2006	Average
Office	0.6	1.8	1.9	8.4	1.6	3.0	1.4	0.9	2.1	2.2	2.4
Retail	7.9	5.1	5.8	5.8	8.9	8.7	5.6	7.1	3.5	4.3	6.3
Industrial	1.4	3.8	3.1	3.0	3.2	3.0	1.7	3.1	1.4	5.7	2.9
Hotel	0.0	0.4	0.2	0.5	0.3	0.8	0.0	0.0	0.0	0.4	0.3
CIE	5.9	2.7	1.9	1.9	5.4	2.3	3.8	4.0	1.8	7.8	3.7
Residential	84.3	85.9	87.0	79.6	79.9	81.5	87.5	84.0	91.2	77.8	83.9
Other	0.0	0.2	0.2	0.9	0.6	0.8	0.0	0.9	0.0	1.7	0.5
TOTAL	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0

Percentage Change

Land Use Category	1997-98	1998-99	1999-00	2000-01	2001-02	2002-03	2003-04	2004-05	2005-06	Average
Office	300.0	12.5	300.0	-86.1	60.0	-50.0	-50.0	200.0	-16.7	74.4
Retail	-17.9	21.7	-10.7	12.0	-17.9	-30.4	0.0	-37.5	0.0	-9.0
Industrial	240.0	-11.8	-13.3	-23.1	-20.0	-37.5	40.0	-42.9	225.0	39.6
Hotel	-	-50.0	100.0	-50.0	100.0	-100.0	-	-	-	0.0
CIE	-42.9	-25.0	-11.1	112.5	-64.7	83.3	-18.2	-44.4	260.0	27.7
Residential	28.0	9.9	-18.7	-27.1	-13.6	16.7	-25.0	37.6	-31.2	-2.6
Other	-	0.0	300.0	-50.0	0.0	-100.0	-	-100.0	-	8.3
TOTAL	25.6	8.5	-11.1	-27.4	-15.3	8.7	-21.9	26.7	-19.3	-2.8

Note:

• CIE = Cultural/Institutional/Educational

Sources:

• San Francisco Planning Department
• Department of Building Inspection

TABLE 6.1.2.B TOTAL CONSTRUCTION COSTS FOR NEW CONSTRUCTION BY LAND USE CATEGORY, 1997-2006

This table presents the total cost of new construction associated with building permits filed by land use category from 1997 - 2006. For consistency with previous C&I reports, costs are adjusted for inflation, with 1983 being the base year. Also included is the percentage distribution in any given year and the annual change within each land use category.

Total Construction Costs (Inflation-Adjusted 1983 \$ 000s)

Land Use Category	1997	1998	1999	2000	2001	2002	2003	2004	2005	2006	TOTAL
Office	\$1,800	\$61,158	\$69,095	\$485,719	\$13,458	\$27,341	\$1,218	\$17,636	\$13,625	\$110,039	\$801,088
Retail	\$21,906	\$28,546	\$34,691	\$161,636	\$24,204	\$20,471	\$34,792	\$9,488	\$4,274	\$527	\$340,535
Industrial	\$4,065	\$6,430	\$8,623	\$25,607	\$13,110	\$9,725	\$1,685	\$2,500	\$460	\$1,932	\$74,135
Hotel	\$0	\$43,665	\$12,164	\$30,029	\$2,879	\$76,341	\$0	\$0	\$0	\$5,727	\$170,805
CIE	\$20,981	\$22,134	\$10,148	\$89,541	\$105,377	\$30,200	\$20,783	\$15,867	\$7,791	\$16,563	\$339,385
Residential	\$268,559	\$401,616	\$296,264	\$268,354	\$284,073	\$338,534	\$199,517	\$369,527	\$633,955	\$375,230	\$3,435,628
Other	\$0	\$487	\$0	\$4,382	\$0	\$0	\$0	\$108	\$0	\$0	\$4,977
TOTAL	\$317,309	\$564,037	\$430,965	\$1,065,268	\$443,100	\$502,611	\$257,995	\$415,126	\$660,105	\$510,018	\$5,166,553

Annual Percentage Distribution

Land Use Category	1997	1998	1999	2000	2001	2002	2003	2004	2005	2006	Average
Office	0.6	10.8	16.0	45.6	3.0	5.4	0.5	4.2	2.1	21.6	11.0
Retail	6.9	5.1	8.0	15.2	5.5	4.1	13.5	2.3	0.6	0.1	6.1
Industrial	1.3	1.1	2.0	2.4	3.0	1.9	0.7	0.6	0.1	0.4	1.3
Hotel	0.0	7.7	2.8	2.8	0.6	15.2	0.0	0.0	0.0	1.1	3.0
CIE	6.6	3.9	2.4	8.4	23.8	6.0	8.1	3.8	1.2	3.2	6.7
Residential	84.6	71.2	68.7	25.2	64.1	67.4	77.3	89.0	96.0	73.6	71.7
Other	0.0	0.1	0.0	0.4	0.0	0.0	0.0	0.0	0.0	0.0	0.1
TOTAL	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0

Percentage Change

Land Use Category	1997-98	1998-99	1999-00	2000-01	2001-02	2002-03	2003-04	2004-05	2005-06	Average
Office	3298.1	13.0	603.0	-97.2	103.2	-95.5	1348.0	-22.7	707.6	650.8
Retail	30.3	21.5	365.9	-85.0	-15.4	70.0	-72.7	-55.0	-87.7	19.1
Industrial	58.2	34.1	197.0	-48.8	-25.8	-82.7	48.4	-81.6	319.8	46.5
Hotel	-	-72.1	146.9	-90.4	2551.9	-100.0	-	-	-	487.2
CIE	5.5	-54.2	782.4	17.7	-71.3	-31.2	-23.7	-50.9	112.6	76.3
Residential	49.5	-26.2	-9.4	5.9	19.2	-41.1	85.2	71.6	-40.8	12.6
Other	-	-100.0	-	-100.0	-	-	-	-	-	-100.0
TOTAL	77.8	-23.6	147.2	-58.4	13.4	-48.7	60.9	59.0	-22.7	22.8

Note:

- CIE = Cultural/Institutional/Educational

Sources:

- San Francisco Planning Department
- Department of Building Inspection

TABLE 6.1.2.C AVERAGE CONSTRUCTION COSTS FOR NEW CONSTRUCTION BY LAND USE CATEGORY, 1997-2006

This table presents the average cost of new construction for all building permits filed by land use category. It represents the total costs (Table 6.1.2.A) divided by the total permits (Table 6.1.2.B).

Average Construction Costs (Inflation-Adjusted 1983 \$ 000s)

Land Use Category	1997	1998	1999	2000	2001	2002	2003	2004	2005	2006	Average
Office	\$899.9	\$7,644.8	\$7,677.2	\$13,492.2	\$2,691.6	\$3,417.6	\$304.5	\$8,818.0	\$2,270.8	\$22,007.7	\$6,922.4
Retail	\$782.3	\$1,241.1	\$1,239.0	\$6,465.4	\$864.4	\$890.0	\$2,174.5	\$593.0	\$427.4	\$52.7	\$1,473.0
Industrial	\$812.9	\$378.2	\$574.9	\$1,969.8	\$1,311.0	\$1,215.6	\$337.0	\$357.1	\$115.0	\$148.6	\$722.0
Hotel	-	\$21,832.7	\$12,164.1	\$15,014.7	\$2,878.8	\$38,170.3	-	-	-	\$5,726.8	\$15,964.6
CIE	\$999.1	\$1,844.5	\$1,127.5	\$11,192.6	\$6,198.7	\$5,033.3	\$1,889.4	\$1,763.0	\$1,558.3	\$920.2	\$3,252.6
Residential	\$895.2	\$1,045.9	\$702.0	\$782.4	\$1,136.3	\$1,567.3	\$791.7	\$1,955.2	\$2,438.3	\$2,096.3	\$1,341.1
Other	-	\$486.7	\$0.0	\$1,095.5	\$0.0	\$0.0	-	\$54.0	-	\$0.0	\$233.8
TOTAL	\$891.3	\$1,261.8	\$888.6	\$2,471.6	\$1,415.7	\$1,896.6	\$895.8	\$1,845.0	\$2,316.2	\$2,217.5	\$1,610.0

Note:

- CIE = Cultural/Institutional/Educational

Sources:

- San Francisco Planning Department
- Department of Building Inspection

TABLE 6.1.3.A BUILDING PERMITS FOR ALTERATIONS AND DEMOLITIONS BY LAND USE CATEGORY, 1997-2006

This table presents the number of building permits filed for alterations and demolitions by land use category from 1997-2006. Also included is the percentage distribution in any given year and the annual change within each land use category.

Number of Permits

Land Use Category	1997	1998	1999	2000	2001	2002	2003	2004	2005	2006	TOTAL
Office	3,524	3,817	4,121	5,308	4,189	3,173	3,577	3,811	4,196	4,126	39,844
Retail	1,947	2,096	2,108	1,765	1,760	1,722	1,737	1,871	1,651	2,129	18,786
Industrial	266	207	269	332	305	231	206	169	181	157	2,323
Hotel	151	171	171	246	190	182	196	183	144	192	1,826
CIE	526	520	544	411	435	506	421	355	351	411	4,480
Residential	17,813	17,744	17,993	17,730	17,138	19,210	19,460	19,741	19,249	19,474	185,552
Other	267	283	269	645	444	284	267	273	379	264	3,375
TOTAL	24,494	24,838	25,475	26,437	24,461	25,308	25,864	26,403	26,151	26,755	256,186

Annual Percentage Distribution

Land Use Category	1997	1998	1999	2000	2001	2002	2003	2004	2005	2006	Average
Office	14.4	15.4	16.2	20.1	17.1	12.5	13.8	14.4	16.0	15.4	15.5
Retail	7.9	8.4	8.3	6.7	7.2	6.8	6.7	7.1	6.3	8.0	7.3
Industrial	1.1	0.8	1.1	1.3	1.2	0.9	0.8	0.6	0.7	0.6	0.9
Hotel	0.6	0.7	0.7	0.9	0.8	0.7	0.8	0.7	0.6	0.7	0.7
CIE	2.1	2.1	2.1	1.6	1.8	2.0	1.6	1.3	1.3	1.5	1.8
Residential	72.7	71.4	70.6	67.1	70.1	75.9	75.2	74.8	73.6	72.8	72.4
Other	1.1	1.1	1.1	2.4	1.8	1.1	1.0	1.0	1.4	1.0	1.3
TOTAL	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0

Percentage Change

Land Use Category	1997-98	1998-99	1999-00	2000-01	2001-02	2002-03	2003-04	2004-05	2005-06	Average
Office	8.3	8.0	28.8	-21.1	-24.3	12.7	6.5	10.1	-1.6	3.1
Retail	7.7	0.6	-16.3	-0.3	-2.2	0.9	7.7	-11.8	29.0	1.7
Industrial	-22.2	30.0	23.4	-8.1	-24.3	-10.8	-18.0	7.1	-13.3	-4.0
Hotel	13.2	0.0	43.9	-22.8	-4.2	7.7	-6.6	-21.3	33.3	4.8
CIE	-1.1	4.6	-24.4	5.8	16.3	-16.8	-15.7	-1.1	17.1	-1.7
Residential	-0.4	1.4	-1.5	-3.3	12.1	1.3	1.4	-2.5	1.2	1.1
Other	6.0	-4.9	139.8	-31.2	-36.0	-6.0	2.2	38.8	-30.3	8.7
TOTAL	1.4	2.6	3.8	-7.5	3.5	2.2	2.1	-1.0	2.3	1.0

Note:

* CIE = Cultural/Institutional/Educational

Sources:

* San Francisco Planning Department
* Department of Building Inspection

TABLE 6.1.3.B TOTAL CONSTRUCTION COSTS FOR ALTERATIONS AND DEMOLITIONS BY LAND USE CATEGORY, 1997-2006

This table presents the total cost of construction associated with building permits filed for alterations and demolitions by land use category from 1997-2006. For consistency with previous C&I reports, costs are adjusted for inflation, with 1983 being the base year. Also included is the percentage distribution in any given year and the annual change within each land use category.

Total Construction Costs (Inflation-Adjusted 1983 \$ 000s)

Land Use Category	1997	1998	1999	2000	2001	2002	2003	2004	2005	2006	TOTAL
Office	\$178,596	\$882,401	\$261,175	\$341,707	\$219,798	\$151,983	\$155,286	\$168,861	\$196,625	\$207,926	\$2,764,358
Retail	\$67,227	\$74,861	\$289,013	\$75,063	\$51,916	\$46,464	\$50,590	\$46,714	\$45,248	\$74,662	\$821,760
Industrial	\$17,325	\$8,815	\$17,111	\$48,712	\$19,991	\$9,217	\$8,023	\$10,122	\$7,491	\$6,872	\$149,639
Hotel	\$15,712	\$34,208	\$13,605	\$93,976	\$18,352	\$10,157	\$4,399	\$2,770	\$16,249	\$27,521	\$236,951
CIE	\$31,200	\$50,997	\$37,546	\$40,562	\$30,340	\$32,952	\$46,866	\$105,026	\$24,618	\$44,540	\$444,647
Residential	\$140,081	\$173,172	\$219,297	\$247,513	\$226,912	\$289,823	\$289,037	\$251,052	\$267,900	\$236,145	\$2,340,931
Other	\$2,044	\$675	\$759	\$3,830	\$1,711	\$625	\$779	\$500	\$1,491	\$3,720	\$16,135
TOTAL	\$482,167	\$1,225,130	\$838,506	\$851,364	\$564,979	\$541,222	\$554,981	\$585,046	\$559,622	\$601,385	\$6,774,421

Annual Percentage Distribution

Land Use Category	1997	1998	1999	2000	2001	2002	2003	2004	2005	2006	Average
Office	39.5	72.0	31.1	40.1	38.9	28.1	28.0	28.9	35.1	34.6	37.6
Retail	14.9	6.1	34.5	8.8	9.2	8.6	9.1	8.0	8.1	12.4	12.0
Industrial	3.8	0.7	2.0	5.7	2.8	1.7	1.4	1.7	1.3	1.1	2.2
Hotel	3.5	2.8	1.6	11.0	3.2	1.9	0.8	0.5	2.9	4.6	3.3
CIE	6.9	4.2	4.5	4.8	5.4	6.1	8.4	18.0	4.4	7.4	7.0
Residential	31.0	14.1	26.2	29.1	40.2	53.5	52.1	42.9	47.9	39.3	37.6
Other	0.5	0.1	0.1	0.4	0.3	0.1	0.1	0.1	0.3	0.6	0.3
TOTAL	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0

Percentage Change

Land Use Category	1997-98	1998-99	1999-00	2000-01	2001-02	2002-03	2003-04	2004-05	2005-06	Average
Office	394.1	-70.4	30.8	-35.7	-30.9	2.2	8.7	16.4	5.7	35.7
Retail	11.4	286.1	-74.0	-30.8	-10.5	8.9	-7.7	-3.1	65.0	27.2
Industrial	-49.1	94.1	184.7	-67.3	-42.2	-13.0	26.2	-26.0	-8.3	11.0
Hotel	117.7	-60.2	590.8	-80.5	-44.7	-56.7	-37.0	486.5	69.4	109.5
CIE	63.5	-26.4	8.0	-25.2	8.6	42.2	124.1	-76.6	80.9	22.1
Residential	23.6	26.6	12.9	-8.3	27.7	-0.3	-13.1	6.7	-11.9	7.1
Other	-67.0	12.4	404.7	-55.3	-63.5	24.6	-35.7	198.0	149.4	63.1
TOTAL	170.9	-31.6	1.5	-33.6	-4.2	2.5	5.4	-4.3	7.5	12.7

Note:

* CIE = Cultural/Institutional/Educational

Sources:

- San Francisco Planning Department
- Department of Building Inspection

TABLE 6.1.3.C AVERAGE CONSTRUCTION COSTS FOR ALTERATIONS AND DEMOLITIONS BY LAND USE CATEGORY, 1997-2006

This table presents the average construction cost for all building permits filed for alterations and demolitions by land use category. It represents the total costs (Table 6.1.3.A) divided by the total permits (Table 6.1.3.B).

Average Construction Costs (Inflation-Adjusted 1983 \$ 000s)

Land Use Category	1997	1998	1999	2000	2001	2002	2003	2004	2005	2006	Average
Office	\$50.7	\$231.2	\$63.4	\$64.4	\$52.5	\$47.9	\$43.4	\$44.3	\$46.9	\$50.4	\$69.5
Retail	\$34.5	\$35.7	\$137.1	\$42.5	\$29.5	\$27.0	\$29.1	\$25.0	\$27.4	\$35.1	\$42.3
Industrial	\$65.1	\$42.6	\$63.6	\$146.7	\$52.3	\$39.9	\$38.9	\$59.9	\$41.4	\$43.8	\$59.4
Hotel	\$104.1	\$200.0	\$79.6	\$382.0	\$96.6	\$55.8	\$22.4	\$15.1	\$112.8	\$143.3	\$121.2
CIE	\$59.3	\$98.1	\$69.0	\$98.7	\$69.7	\$65.1	\$111.3	\$295.8	\$70.1	\$108.4	\$104.6
Residential	\$7.9	\$9.8	\$12.2	\$14.0	\$13.2	\$15.1	\$14.9	\$12.7	\$13.9	\$12.1	\$12.6
Other	\$7.7	\$2.4	\$2.8	\$5.9	\$3.9	\$2.2	\$2.9	\$1.8	\$3.9	\$14.1	\$4.8
TOTAL	\$18.5	\$49.3	\$32.9	\$32.2	\$23.1	\$21.4	\$21.5	\$22.2	\$21.4	\$22.5	\$26.5

Note:

- CIE = Cultural/Institutional/Educational

Sources:

- San Francisco Planning Department
- Department of Building Inspection

TABLE 6.2.1.A ALL BUILDING PERMITS BY COMMERCE & INDUSTRY DISTRICT, 1997-2006

This table presents the number of building permits filed by Commerce & Industry District from 1997-2006 (see Chapter 1.2 – Data Formats for a definition of Commerce & Industry Districts). All building permits include new construction, alteration, and demolitions. Also included is the percentage distribution in any given year and the annual change within each Commerce & Industry District.

Number of Permits

C&I District	1997	1998	1999	2000	2001	2002	2003	2004	2005	2006
Bayview	615	600	667	779	1,023	831	765	651	702	702
Civic Center	681	613	780	951	853	738	858	850	801	766
Financial	2,932	2,990	3,255	4,150	3,301	2,604	2,965	3,363	3,724	3,486
Mission	1,550	1,785	1,800	2,001	1,867	2,127	2,129	2,042	2,004	2,070
North Beach	682	753	751	791	714	888	814	788	842	840
North Central	3,235	3,296	3,315	3,355	2,914	3,581	3,781	3,575	3,602	3,844
Northwest	2,365	2,300	2,291	2,433	2,117	2,285	2,461	2,575	2,477	2,490
South of Market	1,957	2,248	2,482	2,517	2,113	2,053	2,035	2,038	2,116	2,512
Southwest	9,538	9,422	9,199	9,028	8,865	9,574	9,549	9,902	9,372	9,432
Van Ness	1,020	1,012	1,089	1,158	1,086	1,032	1,144	1,140	1,063	1,175
Unclassified	734	808	945	268	408	199	150	153	132	89
TOTAL	25,309	25,829	26,574	27,431	25,261	25,912	26,651	27,077	26,835	27,406

Annual Percentage Distribution

C&I District	1997	1998	1999	2000	2001	2002	2003	2004	2005	2006
Bayview	2.4	2.3	2.5	2.8	4.0	3.2	2.9	2.4	2.6	2.6
Civic Center	2.7	2.4	2.9	3.5	3.4	2.8	3.2	3.1	3.0	2.8
Financial	11.6	11.6	12.2	15.1	13.1	10.0	11.1	12.4	13.9	12.7
Mission	6.1	6.9	6.8	7.3	7.4	8.2	8.0	7.5	7.5	7.6
North Beach	2.7	2.9	2.8	2.9	2.8	3.4	3.1	2.9	3.1	3.1
North Central	12.8	12.8	12.5	12.2	11.5	13.8	14.2	13.2	13.4	14.0
Northwest	9.3	8.9	8.6	8.9	8.4	8.8	9.2	9.5	9.2	9.1
South of Market	7.7	8.7	9.3	9.2	8.4	7.9	7.6	7.5	7.9	9.2
Southwest	37.7	36.5	34.6	32.9	35.1	36.9	35.8	36.6	34.9	34.4
Van Ness	4.0	3.9	4.1	4.2	4.3	4.0	4.3	4.2	4.0	4.3
Unclassified	2.9	3.1	3.6	1.0	1.6	0.8	0.6	0.6	0.5	0.3
TOTAL	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0

Percentage Change

C&I District	1997-98	1998-99	1999-00	2000-01	2001-02	2002-03	2003-04	2004-05	2005-06	Average
Bayview	-2.4	11.2	16.8	31.3	-18.8	-7.9	-14.9	7.8	0.0	2.3
Civic Center	-10.0	27.2	21.9	-10.3	-13.5	16.3	-0.9	-5.8	-4.4	2.1
Financial	2.0	8.9	27.5	-20.5	-21.1	13.9	13.4	10.7	-6.4	2.8
Mission	15.2	0.8	11.2	-6.7	13.9	0.1	-4.1	-1.9	3.3	3.2
North Beach	10.4	-0.3	5.3	-9.7	24.4	-8.3	-3.2	6.9	-0.2	2.5
North Central	1.9	0.5	1.2	-13.1	22.9	5.6	-5.4	0.8	6.7	2.1
Northwest	-2.7	-0.4	6.2	-13.0	7.9	7.7	4.6	-3.8	0.5	0.7
South of Market	14.9	10.4	1.4	-16.1	-2.8	-0.9	0.1	3.8	18.7	3.0
Southwest	-1.2	-2.4	-1.9	-1.8	8.0	-0.3	3.7	-5.4	0.6	-0.1
Van Ness	-0.8	7.6	6.3	-6.2	-5.0	10.9	-0.3	-6.8	10.5	1.6
Unclassified	10.1	17.0	-71.6	52.2	-51.2	-24.6	2.0	-13.7	-32.6	-11.3
TOTAL	2.1	2.9	3.2	-7.9	2.6	2.9	1.6	-0.9	2.1	0.9

Sources:

- San Francisco Planning Department
- Department of Building Inspection

TABLE 6.2.1.B TOTAL CONSTRUCTION COSTS FOR ALL BUILDING PERMITS BY COMMERCE & INDUSTRY DISTRICT, 1997-2006

This table presents the total cost of construction associated with building permits filed by Commerce & Industry District from 1997-2006. For consistency with previous C&I reports, costs are adjusted for inflation, with 1983 being the base year. Also included is the percentage distribution in any given year and the annual change within each Commerce & Industry District.

Total Construction Costs (Inflation-Adjusted 1983 \$ 000s)

C&I District	1997	1998	1999	2000	2001	2002	2003	2004	2005	2006
Bayview	\$12,118	\$26,454	\$45,184	\$139,064	\$39,034	\$22,039	\$24,288	\$26,638	\$68,911	\$31,846
Civic Center	\$46,200	\$78,334	\$37,821	\$77,535	\$91,014	\$76,318	\$51,815	\$44,643	\$37,247	\$70,427
Financial	\$209,973	\$340,034	\$311,004	\$639,353	\$199,284	\$269,136	\$189,814	\$335,011	\$334,856	\$256,927
Mission	\$27,016	\$74,898	\$42,758	\$87,586	\$43,060	\$46,891	\$43,451	\$38,903	\$50,569	\$51,277
North Beach	\$22,317	\$53,882	\$29,259	\$27,976	\$17,654	\$69,510	\$23,739	\$24,274	\$16,853	\$22,985
North Central	\$68,532	\$51,618	\$108,873	\$79,242	\$67,449	\$68,143	\$75,805	\$75,600	\$64,020	\$186,443
Northwest	\$49,586	\$33,316	\$54,345	\$58,529	\$61,017	\$42,026	\$38,631	\$41,461	\$40,921	\$43,595
South of Market	\$185,046	\$946,727	\$397,591	\$523,482	\$223,719	\$252,158	\$136,431	\$164,524	\$385,033	\$262,220
Southwest	\$105,699	\$130,741	\$185,417	\$220,112	\$166,320	\$164,656	\$168,559	\$208,312	\$149,324	\$135,044
Van Ness	\$31,612	\$42,991	\$32,395	\$48,230	\$51,155	\$32,851	\$41,485	\$37,462	\$73,567	\$45,162
Unclassified	\$18,742	\$14,721	\$30,664	\$21,948	\$59,091	\$2,608	\$21,577	\$10,909	\$1,316	\$19,635
TOTAL	\$776,841	\$1,793,717	\$1,275,310	\$1,923,057	\$1,018,798	\$1,046,337	\$815,595	\$1,007,737	\$1,222,617	\$1,125,561

Annual Percentage Distribution

C&I District	1997	1998	1999	2000	2001	2002	2003	2004	2005	2006
Bayview	1.6	1.5	3.5	7.2	3.8	2.1	3.0	2.6	5.6	2.8
Civic Center	5.9	4.4	3.0	4.0	8.9	7.3	6.4	4.4	3.0	6.3
Financial	27.0	19.0	24.4	33.2	19.6	25.7	23.3	33.2	27.4	22.8
Mission	3.5	4.2	3.4	4.6	4.2	4.5	5.3	3.9	4.1	4.6
North Beach	2.9	3.0	2.3	1.5	1.7	6.6	2.9	2.4	1.4	2.0
North Central	8.8	2.9	8.5	4.1	6.6	6.5	9.3	7.5	5.2	16.6
Northwest	6.4	1.9	4.3	3.0	6.0	4.0	4.7	4.1	3.3	3.9
South of Market	23.8	52.8	31.2	27.2	22.0	24.1	16.7	16.3	31.5	23.3
Southwest	13.6	7.3	14.5	11.4	16.3	15.7	20.7	20.7	12.2	12.0
Van Ness	4.1	2.4	2.5	2.5	5.0	3.1	5.1	3.7	6.0	4.0
Unclassified	2.4	0.8	2.4	1.1	5.8	0.2	2.6	1.1	0.1	1.7
TOTAL	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0

Percentage Change

C&I District	1997-98	1998-99	1999-00	2000-01	2001-02	2002-03	2003-04	2004-05	2005-06	Average
Bayview	118.3	70.8	207.8	-71.9	-43.5	10.2	9.7	158.7	-53.8	40.6
Civic Center	69.6	-51.7	105.0	17.4	-16.1	-32.1	-13.8	-16.6	89.1	15.1
Financial	61.9	-8.5	105.6	-68.8	35.1	-29.5	76.5	-0.0	-23.3	14.9
Mission	177.2	-42.9	104.8	-50.8	8.9	-7.3	-10.5	30.0	1.4	5.0
North Beach	141.4	-45.7	-4.4	-36.9	293.7	-65.8	2.3	-30.6	36.4	29.0
North Central	-24.7	110.9	-27.2	-14.9	1.0	11.2	-0.3	-15.3	191.2	23.2
Northwest	-32.8	63.1	7.7	4.3	-31.1	-8.1	7.3	-1.3	6.5	1.6
South of Market	411.6	-58.0	31.7	-57.3	12.7	-45.9	20.6	134.0	-31.9	41.8
Southwest	23.7	41.8	18.7	-24.4	-1.0	2.4	23.6	-28.3	-9.6	4.7
Van Ness	36.0	-24.6	48.9	6.1	-35.8	26.3	-9.7	96.4	-38.6	10.5
Unclassified	-21.5	108.3	-28.4	169.2	-95.6	727.4	-49.4	-87.9	1392.2	211.4
TOTAL	130.9	-28.9	50.8	-47.0	2.7	-22.1	23.6	21.3	-7.9	12.3

Sources:

- San Francisco Planning Department
- Department of Building Inspection

TABLE 6.2.1.C AVERAGE CONSTRUCTION COSTS FOR ALL BUILDING PERMITS BY COMMERCE & INDUSTRY DISTRICT, 1997-2006

This table presents the average construction cost for all building permits filed by Commerce & Industry District. It represents the total costs (Table 6.2.1.A) divided by the total permits (Table 6.2.1.B).

Average Construction Costs (Inflation-Adjusted 1983 \$ 000s)

C&I District	1997	1998	1999	2000	2001	2002	2003	2004	2005	2006
Bayview	\$19.7	\$44.1	\$67.7	\$178.5	\$38.2	\$26.5	\$31.7	\$41.0	\$97.3	\$45.4
Civic Center	\$67.8	\$127.8	\$48.5	\$81.5	\$106.7	\$103.4	\$60.4	\$52.5	\$46.5	\$91.9
Financial	\$71.6	\$113.7	\$95.5	\$154.1	\$60.4	\$103.4	\$64.1	\$99.9	\$90.3	\$73.7
Mission	\$17.4	\$42.0	\$23.8	\$43.8	\$23.1	\$22.0	\$20.4	\$19.0	\$25.2	\$24.8
North Beach	\$32.7	\$71.6	\$39.0	\$35.4	\$24.7	\$78.3	\$28.9	\$30.4	\$19.6	\$27.4
North Central	\$21.2	\$15.7	\$32.8	\$23.6	\$23.1	\$19.0	\$20.1	\$21.2	\$17.8	\$48.5
Northwest	\$21.0	\$14.5	\$23.7	\$24.1	\$28.8	\$18.4	\$15.7	\$16.1	\$16.5	\$17.5
South of Market	\$94.6	\$421.1	\$160.2	\$208.0	\$105.9	\$122.8	\$67.0	\$80.6	\$181.4	\$104.4
Southwest	\$11.1	\$13.9	\$20.2	\$24.4	\$18.8	\$17.2	\$17.7	\$21.0	\$15.9	\$14.3
Van Ness	\$31.0	\$42.5	\$29.7	\$41.6	\$47.1	\$31.8	\$36.2	\$32.9	\$69.5	\$38.4
Unclassified	\$25.5	\$18.2	\$32.4	\$81.9	\$144.8	\$13.1	\$148.8	\$73.2	\$10.0	\$220.6
Citywide Average	\$30.7	\$69.4	\$48.0	\$70.1	\$40.3	\$40.4	\$30.6	\$37.2	\$45.5	\$41.1

Sources:

- San Francisco Planning Department
- Department of Building Inspection

TABLE 6.2.2.A BUILDING PERMITS FOR NEW CONSTRUCTION BY COMMERCE & INDUSTRY DISTRICT, 1997-2006

This table presents the number of building permits filed for new construction by Commerce & Industry District from 1997-2006. Also included is the percentage distribution in any given year and the annual change within each Commerce & Industry District.

Number of Permits

C&I District	1997	1998	1999	2000	2001	2002	2003	2004	2005	2006
Bayview	12	28	44	40	38	30	8	23	34	27
Civic Center	7	5	3	8	4	7	4	4	4	3
Financial	7	11	4	19	5	1	3	6	9	6
Mission	39	69	38	50	21	26	33	22	30	28
North Beach	7	14	4	6	3	23	6	5	4	1
North Central	28	23	61	23	20	13	17	16	41	23
Northwest	34	29	54	33	31	17	16	8	10	16
South of Market	61	100	71	79	36	25	39	31	38	31
Southwest	143	155	194	154	147	115	109	101	86	74
Van Ness	13	9	9	12	6	4	8	6	23	11
Unclassified	5	4	3	6	2	4	45	3	5	10
TOTAL	356	447	485	430	313	265	288	225	284	230

Annual Percentage Distribution

C&I District	1997	1998	1999	2000	2001	2002	2003	2004	2005	2006
Bayview	3.4	6.3	9.1	9.3	12.1	11.3	2.8	10.2	12.0	11.7
Civic Center	2.0	1.1	0.6	1.9	1.3	2.6	1.4	1.8	1.4	1.3
Financial	2.0	2.5	0.8	4.4	1.6	0.4	1.0	2.7	3.2	2.6
Mission	11.0	15.4	7.8	11.6	6.7	9.8	11.5	9.8	10.6	12.2
North Beach	2.0	3.1	0.8	1.4	1.0	8.7	2.1	2.2	1.4	0.4
North Central	7.9	5.1	12.6	5.3	6.4	4.9	5.9	7.1	14.4	10.0
Northwest	9.6	6.5	11.1	7.7	9.9	6.4	5.6	3.6	3.5	7.0
South of Market	17.1	22.4	14.6	18.4	11.5	9.4	13.5	13.8	13.4	13.5
Southwest	40.2	34.7	40.0	35.8	47.0	43.4	37.8	44.9	30.3	32.2
Van Ness	3.7	2.0	1.9	2.8	1.9	1.5	2.8	2.7	8.1	4.8
Unclassified	1.4	0.9	0.6	1.4	0.6	1.5	15.6	1.3	1.8	4.3
TOTAL	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0

Percentage Change

C&I District	1997-98	1998-99	1999-00	2000-01	2001-02	2002-03	2003-04	2004-05	2005-06	Average
Bayview	133.3	57.1	-9.1	-5.0	-21.1	-73.3	187.5	47.8	-20.6	29.7
Civic Center	-28.6	-40.0	166.7	-50.0	75.0	-42.9	0.0	0.0	-25.0	5.5
Financial	57.1	-63.6	375.0	-73.7	-80.0	200.0	100.0	50.0	-33.3	53.1
Mission	76.9	-44.9	31.6	-58.0	23.8	26.9	-33.3	36.4	-6.7	5.3
North Beach	100.0	-71.4	50.0	-50.0	666.7	-73.9	-16.7	-20.0	-75.0	51.0
North Central	-17.9	165.2	-62.3	-13.0	-35.0	30.8	-5.9	156.3	-43.9	17.4
Northwest	-14.7	86.2	-38.9	-6.1	-45.2	-5.9	-50.0	25.0	60.0	1.1
South of Market	63.9	-29.0	11.3	-54.4	-30.6	56.0	-20.5	22.6	-18.4	0.1
Southwest	8.4	25.2	-20.6	-4.5	-21.8	-5.2	-7.3	-14.9	-14.0	-5.5
Van Ness	-30.8	0.0	33.3	-50.0	-33.3	100.0	-25.0	283.3	-52.2	22.5
Unclassified	-20.0	-25.0	100.0	-66.7	100.0	1025.0	-93.3	66.7	100.0	118.7
TOTAL	25.6	8.5	-11.3	-27.2	-15.3	8.7	-21.9	26.2	-19.0	-2.6

Sources:
 • San Francisco Planning Department
 • Department of Building Inspection

TABLE 6.2.2.B TOTAL CONSTRUCTION COSTS FOR NEW CONSTRUCTION BY COMMERCE & INDUSTRY DISTRICT, 1997-2006

This table presents the total cost of new construction associated with building permits filed by Commerce & Industry District from 1997-2006. For consistency with previous C&I reports, costs are adjusted for inflation, with 1983 being the base year. Also included is the percentage distribution in any given year and the annual change within each Commerce & Industry District.

Total Construction Costs (Inflation-Adjusted 1983 \$ 000s)

C&I District	1997	1998	1999	2000	2001	2002	2003	2004	2005	2006
Bayview	\$6,452	\$20,118	\$33,003	\$111,560	\$25,716	\$7,908	\$8,488	\$12,786	\$57,640	\$8,256
Civic Center	\$25,277	\$13,187	\$4,734	\$14,173	\$41,941	\$50,685	\$13,011	\$6,579	\$16,590	\$36,173
Financial	\$52,593	\$138,372	\$79,800	\$305,853	\$35,501	\$106,337	\$21,546	\$192,254	\$151,456	\$105,078
Mission	\$11,582	\$57,842	\$19,003	\$35,149	\$11,632	\$19,940	\$18,060	\$18,335	\$25,690	\$31,414
North Beach	\$2,426	\$31,344	\$12,894	\$5,567	\$1,054	\$50,840	\$3,456	\$3,882	\$2,260	\$457
North Central	\$30,909	\$8,614	\$57,420	\$15,852	\$8,862	\$12,182	\$22,068	\$27,971	\$6,065	\$111,152
Northwest	\$23,989	\$8,452	\$23,634	\$18,486	\$28,988	\$5,297	\$7,299	\$3,675	\$6,550	\$4,165
South of	\$115,495	\$211,302	\$111,307	\$399,808	\$144,524	\$185,276	\$66,333	\$94,819	\$313,439	\$159,029
Southwest	\$34,933	\$51,098	\$67,576	\$126,396	\$71,340	\$55,350	\$59,611	\$33,341	\$26,144	\$26,366
Van Ness	\$12,233	\$22,863	\$5,694	\$15,917	\$21,781	\$8,325	\$22,021	\$13,106	\$53,606	\$10,277
Unclassified	\$1,420	\$847	\$15,919	\$16,507	\$51,762	\$471	\$16,100	\$8,377	\$665	\$17,651
TOTAL	317,309	564,037	430,985	1,065,268	443,100	502,611	257,995	415,126	660,105	\$510,018

Annual Percentage Distribution

C&I District	1997	1998	1999	2000	2001	2002	2003	2004	2005	2006
Bayview	2.0	3.6	7.7	10.5	5.8	1.6	3.3	3.1	8.7	1.6
Civic Center	8.0	2.3	1.1	1.3	9.5	10.1	5.0	1.6	2.5	7.1
Financial	16.6	24.5	18.5	28.7	8.0	21.2	8.4	46.3	22.9	20.6
Mission	3.7	10.3	4.4	3.3	2.6	4.0	7.0	4.4	3.9	6.2
North Beach	0.8	5.6	3.0	0.5	0.2	10.1	1.3	0.9	0.3	0.1
North Central	9.7	1.5	13.3	1.5	2.0	2.4	8.6	6.7	0.9	21.8
Northwest	7.6	1.5	5.5	1.7	6.5	1.1	2.8	0.9	1.0	0.8
South of	36.4	37.5	25.8	37.5	32.6	36.9	25.7	22.8	47.5	31.2
Southwest	11.0	9.1	15.7	11.9	16.1	11.0	23.1	8.0	4.0	5.2
Van Ness	3.9	4.1	1.3	1.5	4.9	1.7	8.5	3.2	8.1	2.0
Unclassified	0.4	0.2	3.7	1.5	11.7	0.1	6.2	2.0	0.1	3.5
TOTAL	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0

Percentage Change

C&I District	1997-98	1998-99	1999-00	2000-01	2001-02	2002-03	2003-04	2004-05	2005-06	Average
Bayview	211.8	64.0	238.0	-76.9	-69.2	7.3	50.6	350.8	-85.7	69.1
Civic Center	-47.8	-64.1	199.4	195.9	20.8	-74.3	-49.4	152.2	118.0	45.1
Financial	163.1	-42.3	283.3	-88.4	199.5	-79.7	792.3	-21.2	-30.6	117.6
Mission	399.4	-67.1	85.0	-66.9	71.4	-9.4	1.5	40.1	22.3	47.6
North Beach	1192.0	-58.9	-56.8	-81.1	4725.7	-93.2	12.3	-41.8	-79.8	551.8
North Central	-72.1	566.6	-72.4	-44.1	37.5	81.2	26.7	-78.3	1732.7	217.8
Northwest	-64.8	179.6	-21.8	56.8	-81.7	37.8	-49.6	78.2	-36.4	9.8
South of	83.0	-47.3	259.2	-63.9	28.2	-64.2	42.9	230.6	-49.3	41.9
Southwest	46.3	32.2	87.0	-43.6	-22.4	7.7	-44.1	-21.6	0.8	4.2
Van Ness	86.9	-75.1	179.5	36.8	-61.8	164.5	-40.5	309.0	-80.8	51.9
Unclassified	-40.4	1779.7	3.7	213.6	-99.1	3318.8	-48.0	-92.1	2555.8	759.2
TOTAL	77.8	-23.6	147.2	-58.4	13.4	-48.7	60.9	59.0	-22.7	20.5

Sources:

- San Francisco Planning Department
- Department of Building Inspection

TABLE 6.2.2.C AVERAGE CONSTRUCTION COSTS FOR NEW CONSTRUCTION BY COMMERCE & INDUSTRY DISTRICT, 1997-2006

This table presents the average cost of new construction for all building permits filed by Commerce & Industry District. It represents the total costs (Table 6.2.2.A) divided by the total permits (Table 6.2.2.B).

Average Construction Costs (Inflation-Adjusted 1983 \$ 000s)

C&I District	1997	1998	1999	2000	2001	2002	2003	2004	2005	2006
Bayview	\$537.7	\$718.5	\$750.1	\$2,789.0	\$676.7	\$263.6	\$1,061.0	\$555.9	\$1,695.3	\$305.8
Civic Center	\$3,611.1	\$2,637.3	\$1,578.0	\$1,771.6	\$10,485.1	\$7,240.7	\$3,252.7	\$1,644.8	\$4,147.5	\$12,057.7
Financial	\$7,513.3	\$12,579.3	\$19,950.0	\$16,097.5	\$7,100.2	\$106,337.1	\$7,181.9	\$32,042.3	\$16,828.4	\$17,513.0
Mission	\$297.0	\$838.3	\$500.1	\$703.0	\$553.9	\$766.9	\$547.3	\$833.4	\$856.3	\$1,121.9
North Beach	\$346.6	\$2,238.8	\$3,223.5	\$927.8	\$351.2	\$2,210.4	\$576.1	\$776.3	\$564.9	\$457.0
North Central	\$1,103.9	\$374.5	\$941.3	\$689.2	\$443.1	\$937.1	\$1,298.1	\$1,748.2	\$147.9	\$4,832.7
Northwest	\$705.6	\$291.4	\$437.7	\$560.2	\$935.1	\$311.6	\$456.2	\$459.4	\$655.0	\$260.3
South of Market	\$1,893.4	\$2,113.0	\$1,567.7	\$5,060.9	\$4,014.5	\$7,411.0	\$1,700.9	\$3,058.7	\$8,248.4	\$5,130.0
Southwest	\$244.3	\$329.7	\$348.3	\$820.8	\$485.3	\$481.3	\$546.9	\$330.1	\$304.0	\$356.3
Van Ness	\$941.0	\$2,540.4	\$632.7	\$1,326.4	\$3,630.2	\$2,081.2	\$2,752.7	\$2,184.4	\$2,330.7	\$934.3
Unclassified	\$284.0	\$211.7	\$5,306.4	\$2,751.2	\$25,880.8	\$117.7	\$357.8	\$2,792.4	\$132.9	\$1,765.1
Citywide Average	\$891.3	\$1,261.8	\$888.6	\$2,477.4	\$1,415.7	\$1,896.6	\$895.8	\$1,845.0	\$2,324.3	\$2,217.5

Sources:

- San Francisco Planning Department
- Department of Building Inspection

TABLE 6.2.3.A BUILDING PERMITS FOR ALTERATIONS AND DEMOLITIONS BY COMMERCE & INDUSTRY DISTRICT, 1997-2006

This table presents the number of building permits filed for alterations and demolitions by Commerce & Industry District from 1997-2006. Also included is the percentage distribution in any given year and the annual change within each Commerce & Industry District.

Number of Permits

C&I District	1997	1998	1999	2000	2001	2002	2003	2004	2005	2006
Bayview	589	554	605	719	956	788	748	617	656	655
Civic Center	642	577	726	919	819	701	814	819	764	736
Financial	2,827	2,874	3,148	4,015	3,198	2,526	2,886	3,267	3,629	3,419
Mission	1,496	1,703	1,737	1,923	1,820	2,087	2,062	2,003	1,954	2,025
North Beach	649	721	721	743	688	841	774	757	829	823
North Central	3,161	3,221	3,206	3,285	2,853	3,537	3,703	3,515	3,510	3,780
Northwest	2,305	2,253	2,214	2,360	2,065	2,254	2,400	2,550	2,453	2,443
South of Market	1,843	2,053	2,259	2,332	1,981	1,951	1,917	1,823	2,000	2,367
Southwest	9,325	9,165	8,918	8,788	8,642	9,420	9,355	9,717	9,214	9,285
Van Ness	991	966	1,044	1,103	1,054	1,008	1,109	1,095	1,025	1,152
Unclassified	666	751	897	250	385	195	96	140	117	70
TOTAL	24,494	24,838	25,475	26,437	24,461	25,308	25,864	26,403	26,151	26,755

Annual Percentage Distribution

C&I District	1997	1998	1999	2000	2001	2002	2003	2004	2005	2006
Bayview	2.4	2.2	2.4	2.7	3.9	3.1	2.9	2.3	2.5	2.4
Civic Center	2.6	2.3	2.8	3.5	3.3	2.8	3.1	3.1	2.9	2.8
Financial	11.5	11.6	12.4	15.2	13.1	10.0	11.2	12.4	13.9	12.8
Mission	6.1	6.9	6.8	7.3	7.4	8.2	8.0	7.6	7.5	7.6
North Beach	2.6	2.9	2.8	2.8	2.8	3.3	3.0	2.9	3.2	3.1
North Central	12.9	13.0	12.6	12.4	11.7	14.0	14.3	13.3	13.4	14.1
Northwest	9.4	9.1	8.7	8.9	8.4	8.9	9.3	9.7	9.4	9.1
South of Market	7.5	8.3	8.9	8.8	8.1	7.7	7.4	7.3	7.6	8.8
Southwest	38.1	36.9	35.0	33.2	35.3	37.2	36.2	36.8	35.2	34.7
Van Ness	4.0	3.9	4.1	4.2	4.3	4.0	4.3	4.1	3.9	4.3
Unclassified	2.7	3.0	3.5	0.9	1.6	0.8	0.4	0.5	0.4	0.3
TOTAL	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0

Percentage Change

C&I District	1997-98	1998-99	1999-00	2000-01	2001-02	2002-03	2003-04	2004-05	2005-06	Average
Bayview	-5.9	9.2	18.8	33.0	-17.6	-5.1	-17.5	6.3	-0.2	2.1
Civic Center	-10.1	25.8	26.6	-10.9	-14.4	16.1	0.6	-6.7	-3.7	2.3
Financial	1.7	9.5	27.5	-20.3	-21.0	14.3	13.2	11.1	-5.8	3.0
Mission	13.8	2.0	10.7	-5.4	14.7	-1.2	-2.9	-2.4	3.6	3.3
North Beach	11.1	0.0	3.1	-7.4	22.2	-8.0	-2.2	9.5	-0.7	2.8
North Central	1.9	-0.5	2.5	-13.2	24.0	4.7	-5.1	-0.1	7.7	2.2
Northwest	-2.3	-1.7	6.6	-12.5	9.2	6.5	6.3	-3.8	-0.4	0.8
South of Market	11.4	10.0	3.2	-15.1	-1.5	-1.7	0.3	4.0	18.4	2.9
Southwest	-1.7	-2.7	-1.5	-1.7	9.0	-0.7	3.9	-5.2	0.8	0.0
Van Ness	-2.5	8.1	5.7	-4.4	-4.4	10.0	-1.3	-6.4	12.4	1.7
Unclassified	12.8	19.4	-72.1	54.0	-49.4	-50.8	45.8	-16.4	-40.2	-9.7
TOTAL	1.4	2.6	3.8	-7.5	3.5	2.2	2.1	-1.0	2.3	0.9

Sources:

- San Francisco Planning Department
- Department of Building Inspection

TABLE 6.2.3.B TOTAL CONSTRUCTION COSTS FOR ALTERATIONS AND DEMOLITIONS BY COMMERCE & INDUSTRY DISTRICT, 1997-2006

This table presents the total cost of construction associated with building permits filed for alterations and demolitions by Commerce & Industry District from 1997-2006. For consistency with previous C&I reports, costs are adjusted for inflation, with 1983 being the base year. Also included is the percentage distribution in any given year and the annual change within each Commerce & Industry District.

Total Construction Costs (Inflation-Adjusted 1983 \$ 000s)

C&I District	1997	1998	1999	2000	2001	2002	2003	2004	2005	2006
Bayview	\$5,534	\$6,308	\$12,011	\$27,301	\$12,591	\$13,980	\$15,632	\$8,229	\$11,028	\$13,149
Civic Center	\$20,754	\$65,046	\$32,980	\$63,235	\$49,009	\$25,538	\$38,673	\$37,850	\$20,561	\$34,178
Financial	\$157,090	\$199,346	\$230,939	\$331,635	\$163,343	\$162,336	\$167,946	\$142,264	\$183,126	\$150,994
Mission	\$15,281	\$17,004	\$23,550	\$52,392	\$31,229	\$26,920	\$35,088	\$20,537	\$24,845	\$19,813
North Beach	\$19,834	\$22,501	\$16,322	\$22,116	\$16,531	\$18,593	\$20,206	\$20,329	\$14,581	\$22,484
North Central	\$37,435	\$42,493	\$51,157	\$62,977	\$58,463	\$55,893	\$53,492	\$27,507	\$57,844	\$75,214
Northwest	\$21,758	\$24,818	\$30,384	\$39,555	\$31,668	\$36,688	\$31,010	\$37,720	\$34,349	\$39,336
South of Market	\$69,270	\$734,697	\$283,454	\$121,360	\$76,097	\$65,617	\$69,516	\$69,449	\$70,364	\$102,406
Southwest	\$69,661	\$79,176	\$117,249	\$93,473	\$94,626	\$109,024	\$108,678	\$174,384	\$122,371	\$108,289
Van Ness	\$18,558	\$19,987	\$26,637	\$31,914	\$29,325	\$24,495	\$19,396	\$24,278	\$19,934	\$33,590
Unclassified	\$17,012	\$13,753	\$13,822	\$5,407	\$2,097	\$2,137	\$5,345	\$2,499	\$620	\$1,933
TOTAL	\$452,187	\$1,225,130	\$838,506	\$851,364	\$564,979	\$541,222	\$564,981	\$565,046	\$559,622	\$601,385

Annual Percentage Distribution

C&I District	1997	1998	1999	2000	2001	2002	2003	2004	2005	2006
Bayview	1.2	0.5	1.4	3.2	2.2	2.6	2.8	1.5	2.0	2.2
Civic Center	4.6	5.3	3.9	7.4	8.7	4.7	6.8	6.7	3.7	5.7
Financial	34.7	16.3	27.5	39.0	28.9	30.0	29.7	25.2	32.7	25.1
Mission	3.4	1.4	2.8	6.2	5.5	5.0	6.2	3.6	4.4	3.3
North Beach	4.4	1.8	1.9	2.6	2.9	3.4	3.6	3.6	2.6	3.7
North Central	8.3	3.5	6.1	7.4	10.3	10.3	9.5	4.9	10.3	12.5
Northwest	4.8	2.0	3.6	4.6	5.6	6.8	5.5	6.7	6.1	6.5
South of Market	15.3	60.0	33.8	14.3	13.5	12.1	12.3	12.3	12.6	17.0
Southwest	15.4	6.5	14.0	11.0	16.7	20.1	19.2	30.9	21.9	18.0
Van Ness	4.1	1.6	3.2	3.7	5.2	4.5	3.4	4.3	3.6	5.6
Unclassified	3.8	1.1	1.6	0.6	0.4	0.4	0.9	0.4	0.1	0.3
TOTAL	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0

Percentage Change

C&I District	1997-98	1998-99	1999-00	2000-01	2001-02	2002-03	2003-04	2004-05	2005-06	Average
Bayview	14.0	90.4	127.3	-53.9	11.0	11.8	-47.4	34.0	19.2	20.7
Civic Center	213.4	-49.3	91.7	-22.5	-47.9	51.4	-2.1	-45.7	66.2	25.5
Financial	26.9	15.8	43.6	-50.7	-0.6	3.5	-15.3	28.7	-17.5	3.4
Mission	11.3	38.5	122.5	-40.4	-13.8	30.3	-41.5	21.0	-20.3	10.8
North Beach	13.4	-27.5	35.5	-25.3	12.5	8.7	0.6	-28.3	54.2	4.4
North Central	13.5	20.4	23.1	-7.2	-4.4	-4.3	-48.6	110.3	30.0	13.3
Northwest	14.1	22.4	30.2	-19.9	15.9	-15.5	21.6	-8.9	14.5	7.4
South of Market	960.6	-61.4	-57.2	-37.3	-13.8	5.9	-0.1	1.3	45.5	84.4
Southwest	13.7	48.1	-20.3	1.2	15.2	-0.3	60.5	-29.8	-11.5	7.7
Van Ness	7.7	33.3	19.8	-8.1	-16.5	-20.8	25.2	-17.9	68.5	9.1
Unclassified	-19.2	0.5	-60.9	-61.2	1.9	150.1	-53.2	-75.2	211.8	9.5
TOTAL	170.9	-31.6	1.5	-33.6	-4.2	4.4	0.0	-1.0	7.5	11.4

Sources:

- San Francisco Planning Department
- Department of Building Inspection

TABLE 6.2.3.C AVERAGE CONSTRUCTION COSTS FOR ALTERATIONS AND DEMOLITIONS BY COMMERCE & INDUSTRY DISTRICT, 1997-2006

This table presents the average construction cost for all building permits filed for alterations and demolitions by Commerce & Industry District. It represents the total costs (Table 6.2.3.A) divided by the total permits (Table 6.2.3.B).

Average Construction Costs (Inflation-Adjusted 1983 \$ 000s)

C&I District	1997	1998	1999	2000	2001	2002	2003	2004	2005	2006
Bayview	\$9.4	\$11.4	\$19.9	\$38.0	\$13.2	\$17.7	\$20.9	\$13.3	\$16.8	\$20.1
Civic Center	\$32.3	\$112.7	\$45.4	\$68.8	\$59.8	\$36.4	\$47.5	\$46.2	\$26.9	\$46.4
Financial	\$55.6	\$69.4	\$73.4	\$82.6	\$51.1	\$64.3	\$58.2	\$43.5	\$50.5	\$44.2
Mission	\$10.2	\$10.0	\$13.6	\$27.2	\$17.2	\$12.9	\$17.0	\$10.3	\$12.7	\$9.8
North Beach	\$30.6	\$31.2	\$22.6	\$29.8	\$24.0	\$22.1	\$26.1	\$26.9	\$17.6	\$27.3
North Central	\$11.8	\$13.2	\$16.0	\$19.2	\$20.5	\$15.8	\$14.4	\$7.8	\$16.5	\$19.9
Northwest	\$9.4	\$11.0	\$13.7	\$16.8	\$15.3	\$16.3	\$12.9	\$14.8	\$14.0	\$16.1
South of Market	\$37.6	\$357.9	\$125.5	\$52.0	\$38.4	\$33.6	\$36.3	\$36.1	\$35.2	\$43.3
Southwest	\$7.5	\$8.6	\$13.1	\$10.6	\$10.9	\$11.6	\$11.6	\$17.9	\$13.3	\$11.7
Van Ness	\$18.7	\$20.7	\$25.5	\$28.9	\$27.8	\$24.3	\$17.5	\$22.2	\$19.4	\$29.2
Unclassified	\$25.5	\$18.3	\$15.4	\$21.6	\$5.4	\$11.0	\$55.7	\$17.9	\$5.3	\$27.6
Citywide Average	\$18.5	\$49.3	\$32.9	\$32.2	\$23.1	\$21.4	\$21.8	\$21.4	\$21.4	\$22.5

Sources:

- San Francisco Planning Department
- Department of Building Inspection

TABLE 6.3.A PERMIT APPLICATIONS BY COMMERCE & INDUSTRY DISTRICT AND LAND USE CATEGORY, 2006

This table presents the permit applications for 2006 by both Commerce & Industry District and Land Use Category. Also included is the percentage distribution in any given by both land use category and Commerce & Industry District.

Number of Permits

C&I District	Office	Retail	Industrial	CIE	Hotel	Residential	Other	TOTAL
Bayview	55	39	46	15	0	492	55	702
Civic Center	196	134	1	30	52	320	33	766
Financial	2,726	293	5	32	39	323	68	3,486
Mission	53	130	10	27	9	1,805	36	2,070
North Beach	94	105	2	15	20	586	18	840
North Central	147	180	8	91	8	3,340	70	3,844
Northwest	52	115	1	49	2	2,224	47	2,490
South of Market	551	764	66	43	42	893	153	2,512
Southwest	164	278	28	95	10	8,717	140	9,432
Van Ness	88	100	1	32	10	923	21	1,175
Unclassified	7	1	2	0	1	30	48	89
TOTAL	4,133	2,139	170	429	193	19,653	689	27,406

Percentage Distribution by C&I District

C&I District	Office	Retail	Industrial	CIE	Hotel	Residential	Other	TOTAL
Bayview	1.3	1.8	27.1	3.5	0.0	2.5	8.0	2.6
Civic Center	4.7	6.3	0.6	7.0	26.9	1.6	4.8	2.8
Financial	66.0	13.7	2.9	7.5	20.2	1.6	9.9	12.7
Mission	1.3	6.1	5.9	6.3	4.7	9.2	5.2	7.6
North Beach	2.3	4.9	1.2	3.5	10.4	3.0	2.6	3.1
North Central	3.6	8.4	4.7	21.2	4.1	17.0	10.2	14.0
Northwest	1.3	5.4	0.6	11.4	1.0	11.3	6.8	9.1
South of Market	13.3	35.7	38.8	10.0	21.8	4.5	22.2	9.2
Southwest	4.0	13.0	16.5	22.1	5.2	44.4	20.3	34.4
Van Ness	2.1	4.7	0.6	7.5	5.2	4.7	3.0	4.3
Unclassified	0.2	0.0	1.2	0.0	0.5	0.2	7.0	0.3
TOTAL	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0

Percentage Distribution by Land Use Category

C&I District	Office	Retail	Industrial	CIE	Hotel	Residential	Other	TOTAL
Bayview	7.8	5.6	6.6	2.1	0.0	70.1	7.8	100.0
Civic Center	25.6	17.5	0.1	3.9	6.8	41.8	4.3	100.0
Financial	78.2	8.4	0.1	0.9	1.1	9.3	2.0	100.0
Mission	2.6	6.3	0.5	1.3	0.4	87.2	1.7	100.0
North Beach	11.2	12.5	0.2	1.8	2.4	69.8	2.1	100.0
North Central	3.8	4.7	0.2	2.4	0.2	86.9	1.8	100.0
Northwest	2.1	4.6	0.0	2.0	0.1	89.3	1.9	100.0
South of Market	21.9	30.4	2.6	1.7	1.7	35.5	6.1	100.0
Southwest	1.7	2.9	0.3	1.0	0.1	92.4	1.5	100.0
Van Ness	7.5	8.5	0.1	2.7	0.9	78.6	1.8	100.0
Unclassified	7.9	1.1	2.2	0.0	1.1	33.7	53.9	100.0
TOTAL	15.1	7.8	0.6	1.6	0.7	71.7	2.5	100.0

Note:

- CIE = Cultural/Institutional/Educational

Sources:

- San Francisco Planning Department
- Department of Building Inspection

TABLE 6.3.B TOTAL CONSTRUCTION COSTS BY COMMERCE & INDUSTRY DISTRICT AND LAND USE CATEGORY, 2006

This table presents the total construction cost for all permit applications for 2006 by both Commerce & Industry District and Land Use Category. Also included is the percentage distribution in any given by both land use category and Commerce & Industry District.

Total Construction Costs (2006 \$ 000s)

C&I District	Office	Retail	Industrial	CIE	Hotel	Residential	Other	TOTAL
Bayview	\$2,347	\$1,009	\$8,265	\$1,713	\$0	\$29,919	\$22,872	\$66,125
Civic Center	\$32,489	\$6,374	\$1	\$10,734	\$8,341	\$88,109	\$184	\$146,232
Financial	\$292,755	\$20,815	\$143	\$2,808	\$4,811	\$210,322	\$1,821	\$533,474
Mission	\$41,432	\$5,020	\$261	\$4,726	\$38	\$54,785	\$207	\$106,469
North Beach	\$23,596	\$3,124	\$774	\$530	\$3,971	\$15,618	\$113	\$47,725
North Central	\$26,096	\$9,464	\$167	\$46,444	\$12,139	\$292,336	\$475	\$387,122
Northwest	\$3,628	\$8,215	\$30	\$16,517	\$15	\$61,907	\$207	\$90,519
South of Market	\$219,382	\$80,414	\$5,487	\$15,167	\$9,500	\$211,714	\$2,800	\$544,463
Southwest	\$10,676	\$18,085	\$2,934	\$24,270	\$115	\$222,290	\$2,032	\$280,400
Van Ness	\$7,373	\$3,564	\$8	\$3,965	\$30,105	\$45,638	\$3,122	\$93,774
Unclassified	\$437	\$36	\$209	\$0	\$0	\$36,798	\$3,290	\$40,770
TOTAL	\$660,209	\$156,120	\$18,279	\$126,873	\$69,035	\$1,269,435	\$37,121	\$2,337,073

Percentage Distribution by C&I District

C&I District	Office	Retail	Industrial	CIE	Hotel	Residential	Other	TOTAL
Bayview	0.4	0.6	45.2	1.4	0.0	2.4	61.6	2.8
Civic Center	4.9	4.1	0.0	8.5	12.1	6.9	0.5	6.3
Financial	44.3	13.3	0.8	2.2	7.0	16.6	4.9	22.8
Mission	6.3	3.2	1.4	3.7	0.1	4.3	0.6	4.6
North Beach	3.6	2.0	4.2	0.4	5.8	1.2	0.3	2.0
North Central	4.0	6.1	0.9	36.6	17.6	23.0	1.3	16.6
Northwest	0.5	5.3	0.2	13.0	0.0	4.9	0.6	3.9
South of Market	33.2	51.5	30.0	12.0	13.8	16.7	7.5	23.3
Southwest	1.6	11.6	16.0	19.1	0.2	17.5	5.5	12.0
Van Ness	1.1	2.3	0.0	3.1	43.6	3.6	8.4	4.0
Unclassified	0.1	0.0	1.1	0.0	0.0	2.9	8.9	1.7
TOTAL	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0

Percentage Distribution by Land Use Category

C&I District	Office	Retail	Industrial	CIE	Hotel	Residential	Other	TOTAL
Bayview	3.5	1.5	12.5	2.6	0.0	45.2	34.6	100.0
Civic Center	22.2	4.4	0.0	7.3	5.7	60.3	0.1	100.0
Financial	54.9	3.9	0.0	0.5	0.9	39.4	0.3	100.0
Mission	38.9	4.7	0.2	4.4	0.0	51.5	0.2	100.0
North Beach	49.4	6.5	1.6	1.1	8.3	32.7	0.2	100.0
North Central	6.7	2.4	0.0	12.0	3.1	75.5	0.1	100.0
Northwest	4.0	9.1	0.0	18.2	0.0	68.4	0.2	100.0
South of Market	40.3	14.8	1.0	2.8	1.7	38.9	0.5	100.0
Southwest	3.8	6.4	1.0	8.7	0.0	79.3	0.7	100.0
Van Ness	7.9	3.8	0.0	4.2	32.1	48.7	3.3	100.0
Unclassified	1.1	0.1	0.5	0.0	0.0	90.3	8.1	100.0
TOTAL	28.2	6.7	0.8	5.4	3.0	54.3	1.6	100.0

Note:

• CIE = Cultural/Institutional/Educational

Sources:

- San Francisco Planning Department
- Department of Building Inspection

TABLE 6.3.C AVERAGE CONSTRUCTION COSTS FOR ALL PERMITS BY COMMERCE & INDUSTRY DISTRICT AND LAND USE CATEGORY, 2006

This table presents the average construction cost for all permit applications for 2006 by both Commerce & Industry District and Land Use Category. It represents the total costs (Table 6.3.A) divided by the total permits (Table 6.3.B).

C&I District	Office	Retail	Industrial	CIE	Hotel	Residential	Other	Average
Bayview	\$42.7	\$25.9	\$179.7	\$114.2	-	\$60.8	\$415.8	\$139.8
Civic Center	\$165.8	\$47.6	\$1.2	\$357.8	\$160.4	\$275.3	\$5.6	\$144.8
Financial	\$107.4	\$71.0	\$28.6	\$87.7	\$123.3	\$651.2	\$26.8	\$156.6
Mission	\$781.7	\$38.6	\$26.1	\$175.1	\$4.2	\$30.4	\$5.7	\$151.7
North Beach	\$251.0	\$29.8	\$386.8	\$35.3	\$198.5	\$26.7	\$6.3	\$133.5
North Central	\$177.5	\$52.6	\$20.9	\$510.4	\$1,517.4	\$87.5	\$6.8	\$339.0
Northwest	\$69.8	\$71.4	\$30.0	\$337.1	\$7.6	\$27.8	\$4.4	\$78.3
South of Market	\$398.2	\$105.3	\$83.1	\$352.7	\$226.2	\$237.1	\$18.3	\$203.0
Southwest	\$65.1	\$65.1	\$104.8	\$255.5	\$11.5	\$25.5	\$14.5	\$77.4
Van Ness	\$83.8	\$35.6	\$7.6	\$123.9	\$3,010.5	\$49.4	\$148.7	\$494.2
Unclassified	\$62.4	\$36.5	\$104.5	-	\$0.0	\$1,226.6	\$68.5	\$249.8
Citywide Average	\$159.7	\$73.0	\$107.5	\$295.7	\$357.7	\$64.6	\$53.9	\$158.9

Note:

- CIE = Cultural/Institutional/Educational

Sources:

- San Francisco Planning Department
- Department of Building Inspection

TABLE 6.4.1.A BUILDING PERMITS BY LAND USE CATEGORY AND PERMIT STATUS, 2006

This table presents the status of building permits by Land Use Category. Also included is the percentage distribution by Land Use Category and by permit status.

Number of Permits

Land Use Category	Approved	Cancelled	Completed	Issued	Other	TOTAL
Office	14	4	2,579	1,454	79	4,130
Retail	5	1	1,212	839	77	2,134
Industrial	0	0	84	63	23	170
CIE	0	0	209	195	25	429
Hotel	0	0	66	120	7	193
Residential	37	13	11,385	7,688	528	19,651
Other	7	3	182	357	140	689
TOTAL	63	21	15,717	10,716	879	27,396

Percentage Distribution by Land Use Category

Land Use Category	Approved	Cancelled	Completed	Issued	Other	TOTAL
Office	22.2	19.0	16.4	13.6	9.0	15.1
Retail	7.9	4.8	7.7	7.8	8.8	7.8
Industrial	0.0	0.0	0.5	0.6	2.6	0.6
CIE	0.0	0.0	1.3	1.8	2.8	1.6
Hotel	0.0	0.0	0.4	1.1	0.8	0.7
Residential	58.7	61.9	72.4	71.7	60.1	71.7
Other	11.1	14.3	1.2	3.3	15.9	2.5
TOTAL	100.0	100.0	100.0	100.0	100.0	100.0

Percentage Distribution by Permit Status

Land Use Category	Approved	Cancelled	Completed	Issued	Other	TOTAL
Office	0.3	0.1	62.4	35.2	1.9	100.0
Retail	0.2	0.0	56.8	39.3	3.6	100.0
Industrial	0.0	0.0	49.4	37.1	13.5	100.0
CIE	0.0	0.0	48.7	45.5	5.8	100.0
Hotel	0.0	0.0	34.2	62.2	3.6	100.0
Residential	0.2	0.1	57.9	39.1	2.7	100.0
Other	1.0	0.4	26.4	51.8	20.3	100.0
TOTAL	0.2	0.1	57.4	39.1	3.2	100.0

Note:

- CIE = Cultural/Institutional/Educational
- "Other" represents those permits still in the pipeline.

Sources:

- San Francisco Planning Department
- Department of Building Inspection

TABLE 6.4.1.B TOTAL CONSTRUCTION COSTS BY LAND USE CATEGORY AND PERMIT STATUS, 2006

This table presents the construction cost of building permits by Land Use Category and by permit status. Also included is the percentage distribution by Land Use Category and by permit status.

Total Construction Costs (2006 \$ 000s)

Land Use Category	Approved	Cancelled	Completed	Issued	Other	TOTAL
Office	\$4,869	\$69	\$246,476	\$343,628	\$64,736	\$659,777
Retail	\$248	\$25	\$108,909	\$42,879	\$3,841	\$155,903
Industrial	\$0	\$0	\$9,616	\$5,882	\$2,782	\$18,279
CIE	\$0	\$0	\$19,462	\$75,307	\$32,104	\$126,873
Hotel	\$0	\$0	\$15,292	\$51,733	\$2,010	\$69,035
Residential	\$8,167	\$2,793	\$205,641	\$533,742	\$519,051	\$1,269,395
Other	\$0	\$1	\$2,457	\$28,991	\$5,672	\$37,121
TOTAL	\$13,284	\$2,887	\$607,854	\$1,082,162	\$630,197	\$2,336,384

Percentage Distribution by Land Use Category

Land Use Category	Approved	Cancelled	Completed	Issued	Other	TOTAL
Office	36.7	2.4	40.5	31.8	10.3	28.2
Retail	1.9	0.9	17.9	4.0	0.6	6.7
Industrial	0.0	0.0	1.6	0.5	0.4	0.8
CIE	0.0	0.0	3.2	7.0	5.1	5.4
Hotel	0.0	0.0	2.5	4.8	0.3	3.0
Residential	61.5	96.7	33.8	49.3	82.4	54.3
Other	0.0	0.0	0.4	2.7	0.9	1.6
TOTAL	100.0	100.0	100.0	100.0	100.0	100.0

Percentage Distribution by Permit Status

Land Use Category	Approved	Cancelled	Completed	Issued	Other	TOTAL
Office	0.7	0.0	37.4	52.1	9.8	100.0
Retail	0.2	0.0	69.9	27.5	2.5	100.0
Industrial	0.0	0.0	52.6	32.2	15.2	100.0
CIE	0.0	0.0	15.3	59.4	25.3	100.0
Hotel	0.0	0.0	22.2	74.9	2.9	100.0
Residential	0.6	0.2	16.2	42.0	40.9	100.0
Other	0.0	0.0	6.6	78.1	15.3	100.0
TOTAL	0.6	0.1	26.0	46.3	27.0	100.0

Note:

- CIE = Cultural/Institutional/Educational
- "Other" represents those permits still in the pipeline.

Sources:

- San Francisco Planning Department
- Department of Building Inspection

TABLE 6.4.1.C AVERAGE CONSTRUCTION COSTS BY LAND USE CATEGORY AND PERMIT STATUS, 2006

This table presents the average construction cost for all permit applications for 2006 by both Land Use Category and permit status. It represents the total costs (Table 6.4.1.A) divided by the total permits (Table 6.4.1.B).

Average Construction Costs (2006 \$ 000s)

Land Use Category	Approved	Canceled	Completed	Issued	Other	TOTAL
Office	\$347.8	\$17.1	\$95.6	\$236.3	\$819.4	\$159.8
Retail	\$49.6	\$25.0	\$89.9	\$51.1	\$49.9	\$73.1
Industrial	-	-	\$114.5	\$93.4	\$120.9	\$107.5
CIE	-	-	\$93.1	\$386.2	\$1,284.2	\$295.7
Hotel	-	-	\$231.7	\$431.1	\$287.1	\$357.7
Residential	\$220.7	\$214.9	\$18.1	\$69.4	\$983.1	\$64.6
Other	\$0.0	\$0.2	\$13.5	\$81.2	\$40.5	\$53.9
TOTAL	\$210.9	\$137.5	\$38.7	\$101.0	\$716.9	\$85.3

Note:

- CIE = Cultural/Institutional/Educational
- "Other" represents those permits still in the pipeline.

Sources:

- San Francisco Planning Department
- Department of Building Inspection

TABLE 6.4.2.A BUILDING PERMITS BY COMMERCE & INDUSTRY DISTRICT AND PERMIT STATUS, 2006

This table presents the status of building permits by Commerce & Industry District. Also included is the percentage distribution by Commerce & Industry District and by permit status.

Number of Permits

C&I District	Approved	Cancelled	Completed	Issued	Other	TOTAL
Bayview	0	1	356	305	40	702
Civic Center	1	1	397	346	20	765
Financial	13	1	2,125	1,277	65	3,481
Mission	6	3	1,114	873	74	2,070
North Beach	2	0	464	340	33	839
North Central	5	6	2,247	1,498	87	3,843
Northwest	9	1	1,477	926	77	2,490
South of Market	2	2	1,379	1,027	101	2,511
Southwest	24	5	5,562	3,580	261	9,432
Van Ness	1	1	593	539	40	1,174
Unclassified	0	0	3	5	81	89
TOTAL	63	21	15,717	10,716	879	27,396

Percentage Distribution by C&I District

C&I District	Approved	Cancelled	Completed	Issued	Other	TOTAL
Bayview	0.0	4.8	2.3	2.8	4.6	2.6
Civic Center	1.6	4.8	2.5	3.2	2.3	2.8
Financial	20.6	4.8	13.5	11.9	7.4	12.7
Mission	9.5	14.3	7.1	8.1	8.4	7.6
North Beach	3.2	0.0	3.0	3.2	3.8	3.1
North Central	7.9	28.6	14.3	14.0	9.9	14.0
Northwest	14.3	4.8	9.4	8.6	8.8	9.1
South of Market	3.2	9.5	8.8	9.6	11.5	9.2
Southwest	38.1	23.8	35.4	33.4	29.7	34.4
Van Ness	1.6	4.8	3.8	5.0	4.6	4.3
Unclassified	0.0	0.0	0.0	0.0	9.2	0.3
TOTAL	100.0	100.0	100.0	100.0	100.0	100.0

Percentage Distribution by Permit Status

C&I District	Approved	Cancelled	Completed	Issued	Other	TOTAL
Bayview	0.0	0.1	50.7	43.4	5.7	100.0
Civic Center	0.1	0.1	51.9	45.2	2.6	100.0
Financial	0.4	0.0	61.0	36.7	1.9	100.0
Mission	0.3	0.1	53.8	42.2	3.6	100.0
North Beach	0.2	0.0	55.3	40.5	3.9	100.0
North Central	0.1	0.2	58.5	39.0	2.3	100.0
Northwest	0.4	0.0	59.3	37.2	3.1	100.0
South of Market	0.1	0.1	54.9	40.9	4.0	100.0
Southwest	0.3	0.1	59.0	38.0	2.8	100.0
Van Ness	0.1	0.1	50.5	45.9	3.4	100.0
Unclassified	0.0	0.0	3.4	5.6	91.0	100.0
TOTAL	0.2	0.1	57.4	39.1	3.2	100.0

Note:

- CIE = Cultural/Institutional/Educational
- "Other" represents those permits still in the pipeline.

Sources:

- San Francisco Planning Department
- Department of Building Inspection

TABLE 6.4.2.B TOTAL CONSTRUCTION COSTS BY COMMERCE & INDUSTRY DISTRICT AND PERMIT STATUS, 2006

This table presents the construction cost of building permits by Commerce & Industry District and by permit status. Also included is the percentage distribution by Commerce & Industry District and by permit status.

Total Construction Costs (2006 \$ 000s)

C&I District	Approved	Cancelled	Completed	Issued	Other	TOTAL
Bayview	\$0	\$275	\$14,213	\$39,885	\$11,752	\$66,125
Civic Center	\$0	\$10	\$28,624	\$110,204	\$7,394	\$146,232
Financial	\$4,719	\$1	\$169,607	\$153,642	\$204,976	\$532,944
Mission	\$1,475	\$16	\$19,725	\$60,477	\$24,777	\$106,469
North Beach	\$106	\$0	\$26,388	\$15,376	\$5,855	\$47,725
North Central	\$379	\$1,101	\$63,087	\$112,267	\$210,175	\$387,008
Northwest	\$2,182	\$100	\$37,373	\$39,238	\$11,625	\$90,519
South of Market	\$110	\$853	\$118,247	\$379,644	\$45,605	\$544,458
Southwest	\$4,284	\$467	\$105,571	\$122,358	\$47,721	\$280,400
Van Ness	\$30	\$65	\$24,971	\$49,019	\$19,649	\$93,734
Unclassified	\$0	\$0	\$49	\$52	\$40,669	\$40,770
TOTAL	\$13,284	\$2,887	\$607,854	\$1,082,162	\$630,197	\$2,336,384

Percentage Distribution by C&I District

C&I District	Approved	Cancelled	Completed	Issued	Other	TOTAL
Bayview	0.0	9.5	2.3	3.7	1.9	2.8
Civic Center	0.0	0.3	4.7	10.2	1.2	6.3
Financial	35.5	0.0	27.9	14.2	32.5	22.8
Mission	11.1	0.5	3.2	5.6	3.9	4.6
North Beach	0.8	0.0	4.3	1.4	0.9	2.0
North Central	2.9	38.1	10.4	10.4	33.4	16.6
Northwest	16.4	3.5	6.1	3.6	1.8	3.9
South of Market	0.8	29.5	19.5	35.1	7.2	23.3
Southwest	32.2	16.2	17.4	11.3	7.6	12.0
Van Ness	0.2	2.3	4.1	4.5	3.1	4.0
Unclassified	0.0	0.0	0.0	0.0	6.5	1.7
TOTAL	100.0	100.0	100.0	100.0	100.0	100.0

Percentage Distribution by Permit Status

C&I District	Approved	Cancelled	Completed	Issued	Other	TOTAL
Bayview	0.0	0.4	21.5	60.3	17.8	100.0
Civic Center	0.0	0.0	19.6	75.4	5.1	100.0
Financial	0.9	0.0	31.8	28.8	38.5	100.0
Mission	1.4	0.0	18.5	56.8	23.3	100.0
North Beach	0.2	0.0	55.3	32.2	12.3	100.0
North Central	0.1	0.3	16.3	29.0	54.3	100.0
Northwest	2.4	0.1	41.3	43.3	12.8	100.0
South of Market	0.0	0.2	21.7	69.7	8.4	100.0
Southwest	1.5	0.2	37.7	43.6	17.0	100.0
Van Ness	0.0	0.1	26.6	52.3	21.0	100.0
Unclassified	0.0	0.0	0.1	0.1	99.8	100.0
TOTAL	0.6	0.1	26.0	46.3	27.0	100.0

Note:

- CIE = Cultural/Institutional/Educational
- "Other" represents those permits still in the pipeline.

Sources:

- San Francisco Planning Department
- Department of Building Inspection

TABLE 6.4.2.C AVERAGE CONSTRUCTION COSTS BY COMMERCE & INDUSTRY DISTRICT AND PERMIT STATUS, 2006

This table presents the average construction cost for all permit applications for 2006 by both Commerce & Industry District and permit status. It represents the total costs (Table 6.4.1.A) divided by the total permits (Table 6.4.1.B).

Average Construction Costs (2006 \$ 000s)

C&I Districts	Approved	Cancelled	Completed	Issued	Other	TOTAL
Bayview	-	\$275.0	\$39.9	\$130.8	\$293.8	\$94.2
Civic Center	\$0.0	\$10.0	\$72.1	\$318.5	\$369.7	\$191.2
Financial	\$363.0	\$0.5	\$79.8	\$120.3	\$3,153.5	\$153.1
Mission	\$245.8	\$5.2	\$17.7	\$69.3	\$334.8	\$51.4
North Beach	\$52.9	-	\$56.9	\$45.2	\$177.4	\$56.9
North Central	\$75.8	\$183.5	\$28.1	\$74.9	\$2,415.8	\$100.7
Northwest	\$242.5	\$100.0	\$25.3	\$42.4	\$151.0	\$36.4
South of Market	\$54.8	\$426.5	\$85.7	\$369.7	\$451.5	\$216.8
Southwest	\$178.5	\$93.4	\$19.0	\$34.2	\$182.8	\$29.7
Van Ness	\$30.0	\$65.0	\$42.1	\$90.9	\$491.2	\$79.8
Unclassified	-	-	\$16.4	\$10.4	\$502.1	\$458.1
TOTAL	\$210.9	\$137.5	\$38.7	\$101.0	\$716.9	\$85.3

Note:

- * "Other" represents those permits still in the pipeline.

Sources:

- San Francisco Planning Department
- Department of Building Inspection

TABLE 6.5 TOTAL OFFICE SPACE IN CENTRAL AND NON-CENTRAL BUSINESS DISTRICTS, 1997-2006

This table presents the total existing office space in the central and non-central business districts from 1997-2006. It also conveys the percent change by year. This information is presented graphically in Figure 6.5.

Building Square Footage (000s)

Location	1997	1998	1999	2000	2001	2002	2003	2004	2005	2006
Central Business District	41,911	42,032	42,727	44,326	43,904	45,663	48,192	48,198	46,719	46,956
Non-Central Business District	19,244	19,392	21,171	21,941	22,137	24,968	22,622	22,686	22,845	22,932
TOTAL	61,155	61,424	63,899	66,267	66,041	70,631	70,814	70,884	69,564	69,888

Percentage Change

Location	1997-98	1998-99	1999-00	2000-01	2001-02	2002-03	2003-04	2004-05	2005-06
Central Business District	0.3	1.7	3.7	-1.0	4.0	5.5	0.0	-3.1	0.5
Non-Central Business District	0.8	9.2	3.6	0.9	12.8	-9.4	0.3	0.7	0.4
TOTAL	0.4	4.0	3.7	-0.3	7.0	0.3	0.1	-1.9	0.5

Note:

- Office Space includes large commercial buildings of 25,000 rentable square feet or larger in the central and non-central business districts, which are defined in footnotes (2) and (3).
- Not included are government, medical, and owner occupied buildings.
- The Central Business District includes the Financial District areas both north and south of Market Street.
- The Non-Central Business District includes Jackson Square, North Waterfront, Yerba Buena, South of Market, West of Kearny, West of Van Ness Corridor, Van Ness, and Union Square.

Sources:

- Cushman & Wakefield of California Research Services
- San Francisco Planning Department

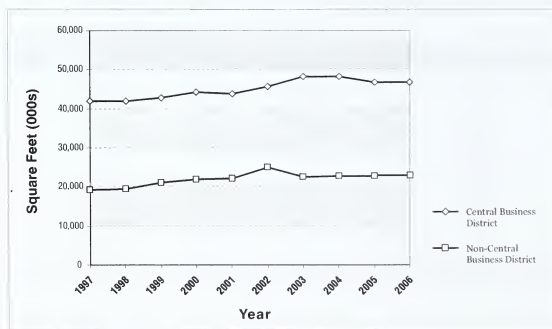
FIGURE 6.5 TOTAL OFFICE SPACE IN CENTRAL AND NON-CENTRAL BUSINESS DISTRICTS, 1997-2006

TABLE 6.6 LAND USE SQUARE FOOTAGE BY PLAN AREA, 2006

This table conveys the area square footage for each land use category for the 21 plan areas in San Francisco. These plan areas are shown in Map 6.6.

Land Square Footage (000s)

Plan Area	Residential	Resid/Mixed	Office	Retail	Industrial	CIE	Hotel	Mixed Uses	Public/OS	Vacant	Other	TOTAL
Balboa	287	209	64	1,585	46	2,832		146	1,255	15	1,301	7,739
Bayview	18,632	3,068	1,977	2,207	17,259	2,061	151	9,527	6,780	10,407	1,688	73,757
C-3	129	533	3,342	1,168	380	359	355	2,152	184	371		8,972
Central Waterfront	452	314	89	210	15,306	63	2	263	80	430	904	18,112
East SoMa	702	1,981	1,751	614	1,259	196	63	1,368	300	609	286	9,129
Geary Better Nbd	12,381	1,327	135	1,327	356	2,452	15	935	578	330		19,837
Hunters Point Shipyard					94	165		34,511		181		34,951
Market-Octavia	4,776	1,449	889	994	545	1,342	62	495	505	597	131	11,786
Mid-Market	32	258	579	276	127	152	74	380	28	391		2,297
Mission	11,414	2,689	678	2,164	3,099	1,917	10	1,158	681	780	98	24,687
Mission Bay	4,122	1,456	10	624	205	44		198		3,665	787	11,110
Port	96		2,154	642	12,699	101		3,419	12,593	155		31,860
Presidio									65,584			65,584
Rest of the City	338,290	27,141	4,658	8,894	2,205	31,662	1,437	20,236	165,749	9,202	7,689	617,164
Rincon Hill	67	423	401	144	71	70		58		63	168	1,465
Showplace Sq. & Potrero Hill	6,840	1,329	1,041	926	3,123	1,554		1,696	906	1,087	1,363	19,864
Transbay	10	14	828	194	85	79		48		159	284	1,702
Van Ness Corridor	560	661	258	237	324	207	104	603		66		3,019
Visitation Valley	8,416	222	485	154	1,079	363	134	15	292	698	102	11,959
West SoMa	879	606	650	1,029	2,953	334	58	1,337	10	478	441	8,776
Yerba Buena	27	204	429	205	7	211	95	1,047		11		2,238
TOTAL	408,112	43,884	20,418	23,595	61,221	46,163	2,561	79,593	255,524	29,694	15,242	986,008

TABLE 6.6 LAND USE SQUARE FOOTAGE BY PLAN AREA, 2006 (CONTINUED)

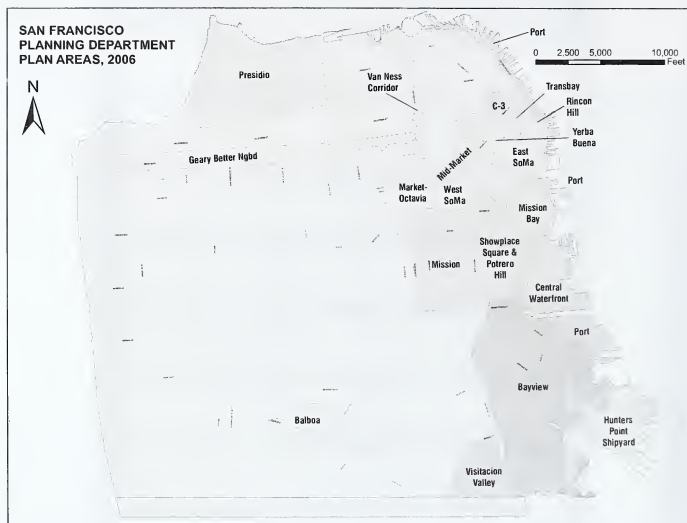
Percentage Distribution by Planning Area												
Plan Area	Residential	Resid Mixed	Office	Retail	Industrial	CIE	Hotel	Mixed Uses	Public/OS	Vacant	Other	TOTAL
Balboa	3.7	2.7	0.8	20.5	0.6	36.6	0.0	1.9	16.2	0.2	16.8	100.0
Bayview	25.3	4.2	2.7	3.0	23.4	2.8	0.2	12.9	9.2	14.1	2.3	100.0
C-3	1.4	5.9	37.2	13.0	4.2	4.0	4.0	24.0	2.0	4.1	0.0	100.0
Central Waterfront	2.5	1.7	0.5	1.2	84.5	0.3	0.0	1.5	0.4	2.4	5.0	100.0
East SoMa	7.7	21.7	19.2	6.7	13.8	2.2	0.7	15.0	3.3	6.7	3.1	100.0
Geary Better Ngbd	62.4	6.7	0.7	6.7	1.8	12.4	0.1	4.7	2.9	1.7	0.0	100.0
Hunters Point Shipyard	0.0	0.0	0.0	0.0	0.3	0.5	0.0	98.7	0.0	0.5	0.0	100.0
Market Octavia	40.5	12.3	7.5	8.4	4.6	11.4	0.5	4.2	4.3	5.1	1.1	100.0
Mid Market	1.4	11.2	25.2	12.0	5.5	6.6	3.2	16.5	1.2	17.0	0.0	100.0
Mission	46.2	10.9	2.7	8.8	12.6	7.8	0.0	4.7	2.8	3.2	0.4	100.0
Mission Bay	37.1	13.1	0.1	5.6	1.8	0.4	0.0	1.8	0.0	33.0	7.1	100.0
Port	0.3	0.0	6.8	2.0	39.9	0.3	0.0	10.7	39.5	0.5	0.0	100.0
Presidio	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	100.0	0.0	0.0	100.0
Rest of the City	54.8	4.4	0.8	1.4	0.4	5.1	0.2	3.3	26.9	1.5	1.2	100.0
Rincon Hill	4.6	28.9	27.3	9.8	4.8	4.8	0.0	4.0	0.0	4.3	11.5	100.0
Showplace Sq & Potrero Hill	34.4	6.7	5.2	4.7	15.7	7.8	0.0	8.5	4.6	5.5	6.9	100.0
Transbay	0.6	0.8	48.6	11.4	5.0	4.7	0.0	2.8	0.0	9.3	16.7	100.0
Van Ness Corridor	18.6	21.9	8.5	7.8	10.7	6.9	3.4	20.0	0.0	2.2	0.0	100.0
Visitacion Valley	70.4	1.9	4.1	1.3	9.0	3.0	1.1	0.1	2.4	5.8	0.8	100.0
West SoMa	10.0	6.9	7.4	11.7	33.7	3.8	0.7	15.2	0.1	5.4	5.0	100.0
Yerba Buena	1.2	9.1	19.2	9.2	0.1	9.4	4.2	46.8	0.0	0.5	0.0	100.0
TOTAL	41.4	4.5	2.1	2.4	6.2	4.7	0.3	8.1	25.9	3.0	1.5	100.0

TABLE 6.6 LAND USE SQUARE FOOTAGE BY PLAN AREA, 2006 (CONTINUED)

Percentage Distribution by Land Use Category

Plan Area	Residential	Rapid Mixed	Office	Retail	Industrial	CIE	Hotel	Mixed Uses	Public/OS	Vacant	Other	TOTAL
Balboa	0.1	0.5	0.3	6.7	0.1	6.1	0.0	0.2	0.5	0.0	8.5	0.8
Bayview	4.6	7.0	9.7	9.4	28.2	4.5	5.9	12.0	2.7	35.0	11.1	7.5
C-3	0.0	1.2	16.4	4.9	0.6	0.8	13.9	2.7	0.1	1.2	0.0	0.9
Central Waterfront	0.1	0.7	0.4	0.9	25.0	0.1	0.1	0.3	0.0	1.4	5.9	1.8
East SoMa	0.2	4.5	8.6	2.6	2.1	0.4	2.5	1.7	0.1	2.0	1.9	0.9
Geary Better Ngbd	3.0	3.0	0.7	5.6	0.6	5.3	0.6	1.2	0.2	1.1	0.0	2.0
Hunters Point Shipyard	0.0	0.0	0.0	0.0	0.2	0.4	0.0	43.4	0.0	0.6	0.0	3.5
Market Octavia	1.2	3.3	4.4	4.2	0.9	2.9	2.4	0.6	0.2	2.0	0.9	1.2
Mid-Market	0.0	0.6	2.8	1.2	0.2	0.3	2.9	0.5	0.0	1.3	0.0	0.2
Mission	2.8	6.1	3.3	9.2	5.1	4.2	0.4	1.5	0.3	2.6	0.6	2.5
Mission Bay	1.0	3.3	0.0	2.6	0.3	0.1	0.0	0.2	0.0	12.3	5.2	1.1
Port	0.0	0.0	10.6	2.7	20.7	0.2	0.0	4.3	4.9	0.5	0.0	3.2
Presidio	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	25.7	0.0	0.0	6.7
Rest of the City	82.9	61.8	22.8	37.7	3.6	68.6	56.1	25.4	64.9	31.0	50.4	62.6
Rincon Hill	0.0	1.0	2.0	0.6	0.1	0.2	0.0	0.1	0.0	0.2	1.1	0.1
Showplace Sq & Potrero Hill	1.7	3.0	5.1	3.9	5.1	3.4	0.0	2.1	0.4	3.7	8.9	2.0
Transbay	0.0	0.0	4.1	0.8	0.1	0.2	0.0	0.1	0.0	0.5	1.9	0.2
Van Ness Corridor	0.1	1.5	1.3	1.0	0.5	0.4	4.1	0.8	0.0	0.2	0.0	0.3
Visitacion Valley	2.1	0.5	2.4	0.7	1.8	0.8	5.2	0.0	0.1	2.3	0.7	1.2
West SoMa	0.2	1.4	3.2	4.4	4.8	0.7	2.3	1.7	0.0	1.6	2.9	0.9
Yerba Buena	0.0	0.5	2.1	0.9	0.0	0.5	3.7	1.3	0.0	0.0	0.0	0.2
TOTAL	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0

MAP 6.6 PLAN AREAS



7.0 TRANSPORTATION

The primary purpose of this new chapter on transportation is to start systematically tracking and publishing information on transportation trends in San Francisco. While there are a number of ways of measuring trends in urban mobility in this city, for consistency, this chapter presents much of the same type of transportation data collected as part of the *Downtown Plan Monitoring Report*. The *Downtown Plan Monitoring Report* is an assessment of the effectiveness of the *Downtown Plan*, prepared every five years as mandated in Chapter 10E of the San Francisco Administrative Code. This chapter tracks changes in transportation trends and provides recent data in the following areas:

- Mode split
- Parking entitlements;
- Vehicle occupancy;
- Transit service; and
- Transit Impact Development Fee (TIDF) revenues.

The transportation data presented in this chapter come from a number of government agency sources, primarily the Planning Department and divisions of the Metropolitan Transit Agency (MTA), but also the American Community Survey, a service of the U.S. Census Bureau. For the purposes of this chapter, data are reported on an annual or biennial basis, either as part of a larger series of thematic reports or as a stand-alone set of data specifically compiled for this inventory report.

7.1 Mode Split

Daily commuters access San Francisco through a number of different transportation modes, including single occupant vehicle (or drive alone); carpool or vanpool; public transit; walking; bicycle; and other modes (e.g., motorcycles, taxicabs). In addition, an increasing number of commuters regularly work at home at least one day a week.

Local trends in commute mode share over the past five years are contained in Table 7.1, below. Data is provided for both San Francisco residents working in all locations (residents), as well as San Francisco employees either residing in San Francisco County or another county in the region (employees). This data includes mode splits for 2000, 2002, and 2004; however, only employee data was available for 2004.

- *Table 7.1 Mode Split for Commuters* — Less than 50% of San Francisco's residents and workers drive alone to work. Substantial increases in walking and bicycling to work, and a slight increase in transit use occurred between 2004 and 2006. Working from home dipped slightly in 2006 for the first time since 2000.

7.2 Parking Entitlements

Studies have shown that the volume and nature of travel is influenced by the availability and price of parking. Where parking is cheap and available, employees tend to drive to work, rather than seek other alternatives. However, where parking is more expensive and alternatives are available, commuters tend to use alternative modes some of the time.

For the purposes of this chapter, annual parking entitlements were generated from the Planning Department database. This data reflects the number of off-street parking spaces approved by the city as part of the permit approval process. On an annual basis, new data on parking entitlements will be provided in this section.

The parking entitlement data are included in Table 7.2. The total number of projects and corresponding parking spaces for calendar years 2004 and 2005 are listed by zoning district; however, the table does not list those districts without a specific set of parking entitlements during 2004 and 2005.

- *Table 7.2 Parking Entitlements, 2004-2006* — Parking entitlements, similar to building permits, tend to fluctuate greatly based on large projects. In 2006, parking spaces in projects increased 43% over those in 2005 even though the number of projects was down slightly. More than 87% of the spaces were in downtown projects: 69% in the C-3 (Downtown Commercial) zoning district and 18% in DTR (Downtown Residential) districts.

7.3 Vehicle Occupancy

This indicator measures the average number of individuals per private vehicle during critical periods of the day, when traffic congestion is at its highest (e.g., peak commute periods). The primary source for local vehicle occupancy rates is the 2006 American Community Survey (ACS) undertaken by the U.S. Bureau of the Census.

This survey estimated the number of individuals commuting to work and their principal modes of travel: drive alone, carpool, public transit, bicycle, walk and other. In order to compute the average vehicle occupancy, the ACS takes the number of commuters arriving by private vehicle (drive alone or carpool/vanpool) and divides by the number of private vehicles.

The data is presented in Table 7.3.

- *Table 7.3 Private Vehicle Occupancy in San Francisco* — Private vehicle occupancy rates dipped 7.5% in 2006 after staying relatively constant from 2000 to 2004.

7.4 Transit Service Levels

Levels of transit service are commonly expressed in terms of transit ridership along a specific line or in specific service areas. In this case, MUNI, the transit operating division of the MTA, provides annual ridership volumes for all of its lines. These data, covering p.m. peak and average daily volumes during Fiscal Year 2004-05, are reported in Table 7.4. This table provides recent ridership data for all of MUNI's existing transit routes throughout the city, including trolley and motorcoach bus service as well as light rail service.

In the future, C & I reports will compare these baseline ridership volumes with future ridership data on an annual basis. This information will provide a clearer picture of future travel demand as it relates to changes in transit ridership.

- *Table 7.4 Transit Ridership on MUNI Lines* — 2006 ridership numbers varied from line to line over the reported 2005 numbers. The MTA expects that ridership numbers may be more accurate for 2006 as automated counters have been installed on transit vehicles. Overall MUNI ridership decreased 2.6% over the 2005 rates. However, ridership was up in 2006 on MUNI's two busiest lines: ridership on the N-Judah increased by 14.2% and on the 38-Geary line by 8.2%.

7.5 TIDF Revenues

The MTA Finance Division assembles data on the volume of revenue collected from the Transit Impact Development Fee (TIDF). These fees, which are collected from building applicants just prior to the issuance of a certificate of occupancy, are subsequently deposited into an account for use by the MTA. Historically, data have indicated wide variations in the volume of revenues collected each year, depending on the number and size of projects approved.

The TIDF has been in effect in San Francisco since 1981, although litigation prevented collection of this fee until three years later. Originally, the TIDF was developed to offset the increased marginal operating and capital costs incurred by MUNI in the late 1970s, during the boom in office development. In response to increasing transit demand, this new fee was designed to provide expanded peak period transit service to downtown MUNI routes. While the application of this fee was originally limited to all new and

converted office space in Downtown San Francisco, in 2004, City legislation expanded its application to most non-residential uses throughout the City.

Annual revenues from the TIDF are shown in Table 7.5. They have been inflation adjusted to 2006 dollars.

- *Table 7.5 TIDF Revenues Collected (Inflation-Adjusted)* — TIDF revenues have fluctuated greatly over the years, although they reached an all-time high in fiscal year 2006 with over \$11 million collected. The 2006 revenues represent a 1,071% increase over those collected in fiscal year 2005. Much of this increase can be attributed to the 2004 legislation which greatly expanded the range of projects subject to the fee. As a result, the TIDF is now collected for almost all non-residential projects throughout the City instead of only office projects in the C-3 (Downtown Commercial) zoning districts.

TABLE 7.1 MODE SPLIT FOR COMMUTERS, 2000-2006

Table 7.1 presents the most recent mode split data for San Francisco's residents and employees. It is shown in terms of the percentages of all trips.

Mode	Residents				Employees	
	2000	2002	2004	2006	2004	2006
Drive Alone	41.0	42.4	42.3	40.5	38.8	37.7
Carpool/Vanpool	9.3	8.7	8.7	7.7	11.9	10.5
Transit	32.2	30.8	29.6	30.3	34.9	35.8
Walk	6.5	8.0	8.2	9.6	5.9	6.9
Bicycle	1.8	2.1	1.8	2.3	1.6	1.5
Work at Home	4.8	6.5	7.7	7.6	5.3	5.4
Other	4.4	1.5	1.7	2.0	2.0	2.2
TOTAL	100.0	100.0	100.0	100.0	100.0	100.0

Source:
 • US Census American
 Community Survey, 2000,
 2002 and 2004, 2006

TABLE 7.2 PARKING ENTITLEMENTS, 2004-2006

Table 7.2 presents the most recent data on parking entitlements in San Francisco.

Zoning District	2004		2005		2006	
	Projects	Net Spaces	Projects	Net Spaces	Projects	Net Spaces
C-2			1	21		
C-3	2	243	5	730	12	2,368
DTR					2	616
M-1	3	368	3	468		
M-2	2	186	1	35	1	163
NC-3	2	21	1	48	3	189
NCD	1	12	2	42	2	18
P	1	25				
RC-4	1	2	7	626		
RH-1	1	4				
RH-2	1	216	2	3		
RH-3	1	1	1	3		
RM-1	1	4				
RM-3	1	1				
RM-4			2	367		
RSD	1	40	1	14		
SLI	2	13				
SLR	1	20	1	42	1	11
SSO	1	35			1	44
TOTAL	22	1,191	27	2,399	27	2,399

Note:

- "C" refers to commercial districts
- "DTR" refers to downtown residential districts
- "M" refers to industrial districts
- "NC" and named areas refer to neighborhood commercial districts
- "P" refers to the public district
- "R" refers to residential districts; and
- "S" refers to support activity districts

Source:

San Francisco Planning Department

TABLE 7.3 PRIVATE VEHICLE OCCUPANCY IN SAN FRANCISCO, 2000-2006

Table 7.3 presents data on private vehicle occupancy rates in San Francisco. It describes the average number of people per trip in San Francisco.

Population	2000	2002	2004	2006
San Francisco Residents	1.22	1.20	1.20	1.11
San Francisco Residents	N/A	N/A	N/A	N/A

Sources:

American Community Survey, 2000, 2002, 2004, 2006

TABLE 7.4 TRANSIT RIDERSHIP ON MUNI LINES, 2005-2006

Table 7.4 presents data on average daily ridership on MUNI lines for 2005 and 2006

Daily Ridership by Route

Route No.	Route Name	2005	2006	Percentage Change
1	California	27,341	23,600	-13.7
1AX	California Express A	898	755	-15.9
1BX	California Express B	1,657	1,753	5.8
2	Clement	5,635	7,113	26.2
3	Jackson	3,649	4,216	15.5
4	Sutter	3,942	1,697	-57.0
5	Fulton	13,184	14,039	6.5
6	Parnassus	6,610	7,158	8.3
7	Haight	5,863	1,693	-71.1
9	San Bruno	17,024	17,708	4.0
9AX	San Bruno Express A	2,184	3,120	42.9
9BX	San Bruno Express B	1,564	2,213	41.5
9X	San Bruno Express	7,873	9,156	16.3
10	Townsend	3,056	3,155	3.2
12	Folsom	7,376	6,928	-6.1
14	Mission	40,109	32,849	-18.1
14L	Mission Limited	4,574	4,940	8.0
14X	Mission Express	2,464	2,711	10.0
15	Third Street	30,440	29,524	-3.0
16AX	Noriega Express A	800	912	14.0
16BX	Noriega Express B	843	910	7.9
17	Parkmerced	1,510	1,348	-10.7
18	46th Avenue	3,578	3,414	-4.6
19	Polk	10,395	9,232	-11.2
21	Hayes	12,279	8,749	-28.7
22	Fillmore	22,806	18,892	-17.2
23	Monterey	4,529	4,421	-2.4
24	Divisadero	11,355	10,717	-5.6
26	Valencia	4,245	2,944	-30.6
27	Bryant	9,157	7,415	-19.0
28	19th Avenue	9,924	9,689	-2.4
29	Sunset	16,596	14,961	-9.9
30	Stockton	29,108	23,741	-18.4
30X	Stockton-Marina Express	2,078	2,419	16.4
31	Balboa	8,690	9,036	4.0
31AX	Balboa Express A	878	898	2.3
31BX	Balboa Express B	712	771	8.3
33	Stanyan	6,167	5,536	-10.2
35	Eureka	737	734	-0.4
36	Teresita	1,015	1,762	73.6
37	Corbett	1,421	1,789	25.9

TABLE 7.4 TRANSIT RIDERSHIP ON MUNI LINES, 2005-2006 (CONTINUED)

Route No.	Route Name	2005	2006	Percentage Change
38	Geary	30,493	33,003	8.2
38L	Geary Limited	18,809	21,304	13.3
38AX	Geary Express A	805	986	22.5
38BX	Geary Express B	1,017	1,180	16.0
39	Coit	404	390	-3.5
41	Union	3,345	3,060	-8.5
43	Masonic	14,264	12,765	-10.5
44	O'Shaughnessy	13,275	12,872	-3.0
45	Union-Stockton	15,994	12,660	-20.8
47	Van Ness	16,529	12,792	-22.6
48	Quintara-24th Street	9,660	9,270	-4.0
49	Van Ness-Mission	26,206	25,266	-3.6
52	Excelsior	3,082	2,387	-22.6
53	Southern Heights	1,146	961	-16.1
54	Felton	5,707	8,288	45.2
56	Rutland	205	218	6.3
66	Quintara	774	772	-0.3
67	Bernal Heights	2,242	2,441	8.9
71	Haight-Noriega	9,704	10,345	6.6
71L	Haight-Noriega Limited	1,811	2,074	14.5
80X	Gateway Express	N/A	132	-
81X	Caltrain Express	N/A	125	-
82X	Levi Plaza	307	268	-12.7
88	BART Shuttle	732	832	13.7
89	Laguna Honda	179	179	0.0
90	Owl	N/A	353	-
91	Owl	N/A	648	-
108	Treasure Island	1,958	3,372	72.2
F	Market	14,139	18,520	31.0
J	Church	20,018	16,695	-16.6
K	Ingleside	18,263	18,444	1.0
L	Taraval	28,607	29,842	4.3
M	Ocean View	24,681	28,671	16.2
N	Judah	39,632	45,252	14.2
TOTAL		668,254	650,985	-2.6

Source: San Francisco Municipal Transportation Agency

TABLE 7.5 TRANSIT IMPACT DEVELOPMENT FEE (TIDF) REVENUES COLLECTED (INFLATION-ADJUSTED), FISCAL YEARS 2002-2006

Table 7.5 presents data on TIDF revenues collected in San Francisco since 1996, inflation adjusted to reflect costs in 2006.

Fiscal Year	Fee Structure	Collections (2006 \$)
2001 - 2002	1981 Ordinance	\$8,463,453
2002 - 2003	1981 Ordinance	\$4,243,018
2003 - 2004	2004 Ordinance	\$1,403,866
2004 - 2005	2004 Ordinance	\$953,455
2005 - 2006	2004 Ordinance	\$11,161,809

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